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2025

CLIENT ORGANIZER

IMPORTANT:

*Please provide a copy of your drivers license.
 If new to our firm, please provide your Social Security Card.*

Name of Taxpayer				SS# - -	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	Email		
Occupation		Date of birth / /		Are you new to our firm? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Address		City		State	Zip
County		Home phone ()		Work or cell ()	
Name of Spouse				SS# - -	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	Email		
Occupation		Date of birth / /		Are you new to our firm? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<i>(Enter information below only if different from Taxpayer)</i>					
Address		City		State	Zip
County		Home phone ()		Work or cell ()	
If you moved during 2025, enter your previous address.				Date of move / /	

Filing status: Single Married Filing Jointly Married Filing Separately Widow(er) Head of Household Unsure
 Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No
 Have you received any notice from the IRS or state revenue department within the past year? Yes No

Names of dependent children <i>Child's full name</i>	Social Security #	Date of birth	Months lived in home in 2025	Relationship to taxpayer	College student?
	- -				
	- -				
	- -				
	- -				

Did any of the children have income above \$1,000 for the year? Yes No Do any of the children have a disability? Yes No
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2025? Yes No

Other dependents or people who lived with you

Name	Social Security #	Date of birth	Relationship	Income
	- -			
	- -			

If you are due a refund, would you like it directly deposited into your bank account? *Name of bank*

Checking <input type="checkbox"/> Savings <input type="checkbox"/>	Routing transit number	Account number
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Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.

TAXPAYER'S SIGNATURE _____ DATE _____

SPOUSE'S SIGNATURE _____ DATE _____

Questions—All Taxpayers

“You” refers to both taxpayer and spouse— enter “?” if unsure about a question.

LIFESTYLE & TAXES	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase health insurance through the marketplace? If so, please provide 1095-A				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Are either you or your spouse legally blind?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay or receive any alimony in 2025? Paid/Received \$	Recipient's SS#			
		What year was the divorce final?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Will there be any significant changes in income or deductions next year, such as retirement?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Have you paid alternative minimum tax (AMT) in previous years?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay anyone for domestic services in your home?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase a new all electric vehicle during the year?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a member of the military?				
<input type="checkbox"/> Yes <input type="checkbox"/> No	Were you a citizen of or live in a foreign country, or receive income from a foreign investment or bank account?					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Would you like to allow your tax preparer or another person to discuss your return with the IRS?	Designee's name		Phone number ()	PIN (any five digits)	
CHILDREN & EDUCATION	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were any children born or adopted in 2025?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were any children attending college?	Year in college	Paid by you: Tuition \$	Student loan interest \$	Books \$
				Paid by student: Tuition \$	Student loan interest \$	Books \$
		Other expenses				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay for child or dependent care so you could work or go to school?				
		Name of provider	EIN or SS #			
	Address	Amount paid \$				
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have any children who earned more than \$2,000 of investment income?					
INVESTMENTS	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you, or will you, contribute any money to an IRA for 2025?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you roll over any amounts from a retirement account in 2025?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you sell or transfer any stock or sell rental or investment property?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you have any investments become worthless or were you a victim of investment theft in 2025?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were you granted, or did you exercise, any employee stock options during 2025?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you sell any cryptocurrency (Bitcoin, Ethereum, etc)				
DEDUCTIONS	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay any interest on a loan for a boat or RV that has living quarters?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay sales taxes on a major purchase in 2025, such as a vehicle, boat, or home?				
BUSINESS	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you work from a home office or use your car for business?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you receive any income from an installment sale?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?				
HOME	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase or sell a main home during the year? If yes, provide closing statement.				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased?				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you refinance a mortgage or take a home equity loan? (Provide closing statement)				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?				

State information Full-year resident Part-year resident Nonresident

States of residence during 2025 and dates

School district

Do you rent or own your home? Rent Own

How much is rent per month?

Income Worksheet

Provide to your preparer all Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, and other income reporting statements. Do not list dollar amounts for the following forms. Your preparer will report the appropriate amounts.

Indicate "T" for taxpayer, "S" for spouse, "J" for joint

Provide additional statements if more room is needed

Forms W-2 — Wage and Tax Statement

T/S	Employer name	T/S	Employer name
	1)		4)
	2)		5)
	3)		6)

Forms 1099-INT— Interest Income

T/S/J	Name of issuer	T/S/J	Name of issuer
	1)		4)
	2)		5)
	3)		6)

Forms 1099-DIV— Dividends and Distributions

T/S	Name of issuer	T/S	Name of issuer
	1)		4)
	2)		5)
	3)		6)

Forms 1099-R — Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, Etc.

T/S	Name of issuer	T/S	Name of issuer
	1)		4)
	2)		5)
	3)		6)

If the distribution is before age 59½, give a reason to determine if an exception to penalty applies.

Tax-Exempt Interest (such as municipal bonds — include statement)

Payer	\$	Payer	\$

Other Income

State tax refund	\$	Unreported tips	\$
Alimony	\$	Other	\$
Unemployment compensation	\$		\$
Social Security (taxpayer) — provide SSA-1099 or RRB-1099	\$		\$
Social Security (spouse)— provide SSA-1099 or RRB-1099	\$		\$
Business income (see <i>Sole Proprietorship Tax Organizer</i>)		Stock sales	See "Sales and Exchanges Worksheet" below.
Rental income (see <i>Rental Property Tax Organizer</i>)		Sale of other property	

Sales and Exchanges Worksheet

Provide information about sales of stock, real estate, or other property, along with Forms 1099-B, 1099-S, or other supporting statements.

Description of property	Purchase date	Cost/basis	Sell date	Sale price
		\$		\$
		\$		\$
		\$		\$

Notes:

- When stock is sold, you will usually receive Form 1099-B, *Proceeds From Broker and Barter Exchange Transactions*, reporting the proceeds from the sale. However, your statement will not always provide the cost/basis information necessary to compute gain or loss. If the statement does not contain the cost/basis information, you must provide it. You may need to contact your broker for questions about cost/basis and purchase dates of your stock accounts.
- Often, "transfers" of stock or mutual funds within a brokerage account are actually sales of one type of stock and purchase of another. Even if you did not receive any cash from the transaction, you may have taxable gain or loss.
- If your stock dividends are automatically reinvested, the dividends will be taxable even though you did not receive any cash. The transaction is treated as if you had received cash and purchased additional stock. When the stock is sold, the amount reinvested over the years is taken into account. You may need to contact your broker for questions about the amount of reinvested dividends.
- If you sold property other than stock, your taxable gain or loss will be determined by your cost/basis. The cost/basis is usually the original purchase price plus improvements (the cost of repairs and maintenance are not taken into account for cost/basis).

Self Employment Information

Business Name

Total Sales		Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/>	
Expenses			
Advertising		Repairs Expense	
Commissions/Fees		Supplies Expense	
Dues & Publications		Taxes	
Interest Expense		Travel Expense	
Insurance		Uniforms	
Legal & Professional Fees		Telephone	
Office Expense		Utilities	
Rent (office) Expense		Wages (gross W-2)	
Equipment Rental Expense		Postage	
Auto Expense		Bank Charges	
Auto Mileage		Tools & Equipment	
EIDL / PPP Loan			
Assets Purchased			Notes
Date	Amount	Asset	
Cost of Goods Sold			
Inventory at beginning of year		Material & Supplies	
Purchases		Other	
Cost of items for personal use		Other	
Cost of labor		Inventory at end of year	

Rental Income	Property #1	Property #2	Property #3	Property #4
Address				
City/ State				
Rent Received				
Expenses				
Advertising				
Auto & Travel				
Auto Miles				
Cleaning & Maintenance				
Commissions Paid				
Grounds & Gardening				
Insurance				
Interest Expense				
Legal & Professional				
Management Fees				
Repairs & Maintenance				
Supplies				
Taxes				
Utilities				
Association Dues				
Pest Control				
Other:				
Other:				
Other:				
Other:				
Other:				
Other:				

Estimated Tax Payments—Tax Year 2025

<i>Installment</i>	<i>Date paid</i>	<i>Federal</i>	<i>Date paid</i>	<i>State</i>
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2024 refund?		\$		\$
Total		\$		\$

Tax Preparation Checklist **Please provide the following documentation:**

- All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.
- Form 1095-A (for health insurance purchased through a public exchange), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).
- If you are a new client, provide copies of last year's tax returns.
- The completed Individual Income Tax Organizer. *Note:* If you choose not to fill out the organizer, you must at least answer the "Yes" or "No" questions under "Questions—All Taxpayers."
- Copy of the closing statement if you bought or sold real estate.
- Mileage figures for any automobile expenses claimed, including total mileage, community mileage, and business mileage.
- Detail of estimated tax payments made, if any.
- Income and deductions categorized on a separate sheet for business or rental activities.
- List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions.
- Copy of all acknowledgement letters received from charitable organizations for contributions made in 2025.

Tax Return Preparation

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax return contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payments. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.