

2024 INCOME TAX ORGANIZER

Taxpayer's Name				Social Security Number	
Spouse's Name				Social Security Number	
Taxpayer's Occupation			Date of Birth (D.O.B.)		Blind?
Spouse's Occupation			Date of Birth (D.O.B.)		Blind?
Address				e-mail address	
City	State	Zip	Home Phone		Work Phone
Cell/Mobile Phone		Do you consent to receiving text messages? ☐ Yes ☐ No			

DEPENDENT CHILDREN (who lived with you more than 6 months)

1) Name	Social Security No.	D.O.B.	2) Name	Social Security No.	D.O.B.
3) Name	Social Security No.	D.O.B.	4) Name	Social Security No.	D.O.B.

OTHER DEPENDENTS

1) Name	Social Security No.	Time at home	Relationship	Income	Support by you	Support by dependent & others
2) Name	Social Security No.	Time at home	Relationship	Income	Support by you	Support by dependent & others

☒ THINGS TO BRING (if applicable)

- | | | |
|--|---|--|
| ☐ Last Year's Tax Return (if new client) | ☐ Cryptocurrency Sales and/or Earnings | ☐ Last Pay Stub of the Year |
| ☐ W-2 Form(s) for Wages | ☐ Business/Rental/Farm Income & Expenses | ☐ Charitable Contribution Details |
| ☐ 1099 Form(s) for Interest, Dividends, Sales, Retirement, Social Security, Self-employment, Unemployment, Cancelled Debt, & Other Income/Distributions | ☐ Records of Estimated Taxes Paid | ☐ Voided Check for Direct Deposit |
| ☐ IRA Year-end Statements (IRA, Roth IRA, SEP IRA, & SIMPLE IRA) | ☐ HSA forms (1099-SA & 5498-SA) | ☐ Form(s) 1095-A – For health Insurance purchased on healthcare.gov (or your state's ACA marketplace) |
| ☐ K-1s from Partnerships, Corporations, Estates or Trusts | ☐ Childcare Provider Information | ☐ Copy of Driver's License for Taxpayer & Spouse |
| ☐ Assets Held Outside the USA (bring statements) | ☐ Property Tax Statements | ☐ Copy of Social Security Card (for new clients and new family members) |
| | ☐ 1098 Form(s) - Mortgage Interest, Tuition, Student Loans, Vehicle/Boat Donations | ☐ All other documents referenced below & on page 2 |
| | ☐ Closing Papers for Purchases & Sales (with purchase and sale dates & amounts) | |
| | ☐ All Other Statements Showing Income | |
| | ☐ Undocumented Income (bring details) | |

RENTAL/SELF-EMPLOYMENT/FARM INCOME

(see reverse for expenses)

Landlords (rents received)	\$	
Self-employment (total received)	\$	
Farm income (total received)	\$	

SALE OF STOCK OR OTHER PROPERTY

Item:	Cost:	Sale:
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$

OTHER INCOME

Wages (forms W2).....	\$	
Interest (forms 1099-INT).....	\$	
Dividends (forms 1099-DIV).....	\$	
Tips.....	\$	
Child Care.....	\$	
Retirement (forms 1099-R).....	\$	
Social Security (form SSA-1099).....	\$	
Jury Duty.....	\$	
Election Judging.....	\$	

OTHER INCOME (cont.)

Roth Conversions (form 1099-R).....	\$	
Gambling Winnings (form W2-G).....	\$	
Unemployment (1099-G).....	\$	
Alimony Received.....	\$	
Prizes/Awards.....	\$	
Scholarships & Fellowships.....	\$	
Debt Cancellation.....	\$	
Partnerships & S-Corporations.....	\$	
Estates & Trusts.....	\$	
Social Security/RR Retirement.....	\$	
State Tax Refunds.....	\$	
Royalties (music/writing/other).....	\$	
Sick Pay &/or Disability.....	\$	
Veteran's Payments.....	\$	
Withdrawals from HSA/MSA.....	\$	
Hobby Income.....	\$	
Odd Jobs/Side Jobs.....	\$	
Research/Survey/Online.....	\$	
Insurance Claims/Lawsuits.....	\$	
Public Assistance.....	\$	
Barter.....	\$	
Foreign Income.....	\$	
Cryptocurrency sales/earnings.....	\$	
All Other Income.....	\$	

★ Bring statements if available. Double-check 'online' accounts that don't send paper statements (e.g. brokerage, HSA, tuition, etc.).

Potential Deductions and Credit Items

ADJUSTMENTS

Payments to an IRA

Traditional ☐ Roth ☐

Taxpayer Amount \$

SEP ☐ SIMPLE ☐

Spouse Amount \$

Penalty for Early Withdrawal

Alimony Paid \$: SS#: - -

Self-Employed Health Insurance

Student Loan Interest

Payments to HSA/MSA: Taxpayer Spouse

Classroom Materials for Educators

MEDICAL EXPENSES

Insurance & Medicare (not pretax)
Long Term Care Insurance
Prescriptions
Eyeglasses, Hearing Aids & Batteries
Doctors
Dentists
Hospital / Ambulance
Auto Mileage miles
Other Medical Expenses, Travel
Reimbursement
Did you receive reimbursement at work?

TAXES

Real Estate Taxes
State taxes paid in '24 for '23 or earlier
Sales tax paid on vehicles, boats, planes
Sales tax paid (from receipts)
2024 State Tax Estimates
date pd. \$ date pd. \$
date pd. \$ date pd. \$
2024 Federal Tax Estimates
date pd. \$ date pd. \$
date pd. \$ date pd. \$
Vehicle License Tabs, Pers. Prop. Tax

INTEREST EXPENSE

Home Mortgage—Paid to Financial Institutions (Form 1098)

First Mortgage/Refinance

Loan Origination Fee/Discount Fee

Second Mortgage

Home Equity

Equity loan used only to buy/build/improve home? Y ☐ N ☐

Mortgage Insurance

Second Home Interest Payments

Home Mortgage—Pd. to Individuals
(name, address, Social Security number)

Investment Interest: Margin Account

Other Investment Interest

OTHER MISCELLANEOUS EXPENSES

Gambling Losses
Impairment Related Work Expenses

HIGHER EDUCATION EXPENSES

Post Secondary Tuition/Req. Fees Paid
Date: Year in School

CONTRIBUTIONS

Churches (received)
Other Contributions of Money (received)
Charitable Auto Mileage
Volunteer Expenses (received)
Property Donated (for which you have receipts)
Fair market value (bring
documentation if over \$500)
Auto, Boat Donations (Form 1098C)
Qualified Charitable Distribution from IRA? Y ☐ N ☐ (bring details)

CASUALTY & THEFT LOSSES

(BUSINESS RELATED OR FEDERAL DISASTER AREA)

Cost of Property Lost
Fair Market Value of Property
Insurance Reimbursement Received
Federally Declared Disaster Area? Y ☐ N ☐ (bring details)

AUTOMOBILE EXPENSE

Total Miles: Business Miles:
Commuting Miles: Personal Miles:
Jan. 1, 2024, Odometer Beginning:
Dec. 31, 2024, Odometer Ending:
Gas & Oil
Interest
Tolls & Local Transportation
Lease Payments
Parking
Other:

BUSINESS EXPENSES

Taxes
Utilities
Insurance
Repairs
Supplies
Business Meals
Business Travel
Advertising
Professional Dues/Memberships
Legal/Professional Fees
Wages (bring copies of W2s/941s if they have been filed)
Contract Labor
Equipment (bring a list with details)
Other:
Is your primary place of business in your home? If yes, bring all home
related expenses, total square footage and square footage of space that
is exclusively and regularly used for business.

CHILD CARE EXPENSES

Names, addresses, and ID#s of provider(s), amount paid.

Do you have a dependent care benefit plan at work?

ADOPTION EXPENSES

Amount Paid: Date Finalized: (bring papers)

ENERGY CREDITS / PLUG-IN VEHICLE

(BRING RECEIPTS AND DETAILS)

Furnace ☐ Central AC ☐ Heat Pump ☐ Doors/windows ☐
Solar ☐ Wind ☐ Geothermal ☐ Plug-in EV ☐ Other

Please sign here _____ date _____