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2025 TAX ORGANIZER

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I (We) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct and complete to the best of my (our) knowledge.

Taxpayer Signature	Date
Spouse Signature	Date



2025

Personal Information

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Taxpayer:

First Name and Initial	Last Name	Social Security Number	
Occupation	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	
Driver's License or State-Issued ID Number	Expiration Date (Mo/Da/Yr)	Issue Date (Mo/Da/Yr)	State
<input type="checkbox"/> Driver's License	<input type="checkbox"/> State-Issued ID	<input type="checkbox"/> No Identification	<input type="checkbox"/> Does not expire

Spouse:

First Name and Initial	Last Name	Social Security Number	
Occupation	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	
Driver's License or State-Issued ID Number	Expiration Date (Mo/Da/Yr)	Issue Date (Mo/Da/Yr)	State
<input type="checkbox"/> Driver's License	<input type="checkbox"/> State-Issued ID	<input type="checkbox"/> No Identification	<input type="checkbox"/> Does not expire

Contact Information:

Street Address	Apartment Number	
City	State	ZIP or Postal Code
Foreign Province or County		
Foreign Country		
Taxpayer Daytime/Work Phone	Taxpayer Evening/Home Phone	Taxpayer Foreign Phone
Taxpayer Cell Phone	Taxpayer Fax Number	
Spouse Daytime/Work Phone	Spouse Evening/Home Phone	Spouse Foreign Phone
Spouse Cell Phone	Spouse Fax Number	
Taxpayer Email Address		
Spouse Email Address		
Preferred Method of Contact		

May the IRS or other taxing authority discuss the return with the preparer? Yes NoIs the taxpayer claimed as a dependent on someone else's tax return? Taxpayer SpouseAre you considered legally blind per IRS regulations? Yes NoDo you want to contribute to the Presidential Election Campaign Fund? Yes NoAre you a U.S. citizen or Green Card holder? Yes No**Personal Identification Numbers:** Code - 1 - Issued by IRS 2 - Issued by State or City

The IRS has recommended that taxpayers have an Identity Protection (IP) PIN to increase filing security. If you would like an IP PIN for yourself, your spouse, or your dependents or have one but do not know the IP PIN assigned, visit IRS.gov to retrieve it or apply.

TS	State	City	Code	PIN	Prior Year PIN



2025

Dependents

3A

Dependent Information:

	First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	Relationship to Taxpayer
A						
B						
C						
D						
E						
F						
G						
H						

Did dependent have income over \$5,200?



	Months Lived in Your Home	X if Disabled	Yes or No	Identity Protection PIN	Prior Year IP PIN
A					
B					
C					
D					
E					
F					
G					
H					

Provide the name of any dependent who is not a U.S. citizen or Green Card holder.

Provide the name of any person living with you who is claimed as a dependent on someone else's tax return.

List the years that a release of claim to exemption is given for a dependent child not living with you.



2025

Direct Deposit and Withdrawal

4A

Direct Deposit and Electronic Funds Withdrawal Account Information:

The IRS and certain states allow refunds to be deposited to and balances due to be paid directly from your financial institution. If you would like to receive your refund or pay a balance due electronically, complete the following information. Additional space has been provided for the use of multiple accounts. If you selected direct deposit or electronic withdrawal in 2024, your account information is already included below.

Yes	No

Would you like any refunds owed to you directly deposited?

Would you like to pay any amount due on your federal return using electronic withdrawal?

If Yes, what amount would you like withdrawn, if not the entire balance due?

If Yes, when should the withdrawal occur, if other than the due date of the return? (Mo/Da/Yr)

Would you like to pay any amount due on your state return(s) using electronic withdrawal?

If Yes, what amount would you like withdrawn, if not the entire balance due?

If Yes, when should the withdrawal occur, if other than the due date of the return? (Mo/Da/Yr)

The IRS and some states allow estimated payments to be electronically withdrawn on the due dates of the estimated payments.

Would you like to pay any estimated payments due for your federal return using electronic withdrawal?

Would you like to pay any estimated payments due for your state return(s) using electronically withdrawal, if available?

Name of bank or financial institution

Routing Transit Number (RTN)

Account number

Type of account: Checking Traditional Savings IRA Savings
 Archer MSA Savings Coverdell Ed. Savings HSA Savings

Is this a business account? Yes No

Account owner Taxpayer Spouse Joint

I confirm that the bank account information and the direct deposit/electronic withdrawal options selected above are correct.

Yes	No

Would you like any refunds owed to you directly deposited?

Would you like to pay any amount due on your federal return using electronic withdrawal?

If Yes, what amount would you like withdrawn, if not the entire balance due?

If Yes, when should the withdrawal occur, if other than the due date of the return? (Mo/Da/Yr)

Would you like to pay any amount due on your state return(s) using electronic withdrawal?

If Yes, what amount would you like withdrawn, if not the entire balance due?

If Yes, when should the withdrawal occur, if other than the due date of the return? (Mo/Da/Yr)

The IRS and some states allow estimated payments to be electronically withdrawn on the due dates of the estimated payments.

Would you like to pay any estimated payments due for your federal return using electronic withdrawal?

Would you like to pay any estimated payments due for your state return(s) using electronically withdrawal, if available?

Name of bank or financial institution

Routing Transit Number (RTN)

Account number

Type of account: Checking Traditional Savings IRA Savings
 Archer MSA Savings Coverdell Ed. Savings HSA Savings

Is this a business account? Yes No

Account owner Taxpayer Spouse Joint

I confirm that the bank account information and the direct deposit/electronic withdrawal options selected above are correct.

Questions (Page 1 of 5)

The following questions pertain to the 2025 tax year. For any question answered Yes, include supporting detail or documents.

Personal Information:

Yes No

Did your marital status change? _____

Are you married? _____

If Yes, do you and your spouse want to file separate returns? _____

If No, are you in a domestic partnership, civil union, or other state-defined relationship? _____

Can you or your spouse be claimed as a dependent by another taxpayer? _____

Did you or your spouse serve in the military or were you or your spouse on active duty? _____

Dependents:

Were there any changes in dependents from the prior year?
Note: Include non-child dependents for whom you provided more than half the support. _____

Did you or your spouse pay for child care while you or your spouse worked or looked for work? _____

Do you have any children under age 18 with unearned income more than \$1,350? _____

Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than \$1,350? _____

Did you adopt a child or begin adoption proceedings? _____

Are any of your dependents non-U.S. citizens or non-U.S. residents? _____

Healthcare:

Did you obtain healthcare coverage through the Marketplace? _____

If Yes, include all Forms 1095-A.

If you received advance premium tax credit, are married, and are filing separately from your spouse, are you a victim of domestic abuse or spousal abandonment? _____

Did you, your spouse, or a dependent have healthcare purchased through the Marketplace and for whom you did not receive Form 1095-A? _____

Did you receive Form 1095-A for someone claimed as a dependent on another taxpayer's return or who is filing their own return and is not claimed on another taxpayer's return? _____

Are any of your dependents required to file a tax return? _____

Questions (Page 2 of 5)

Healthcare (continued):

Yes No

Was anyone covered on your health insurance policy also covered on another health insurance policy for any part of the year? _____

Were you eligible for employer-sponsored healthcare coverage? _____

Did you or your spouse have any transactions pertaining to a health savings account (HSA)?

If you received a distribution from an HSA, include all Forms 1099-SA.

Did you or your spouse have any transactions pertaining to a medical savings account (MSA)?

If you received a distribution from an MSA, include all Forms 1099-SA.

Did you or your spouse receive any distributions from long-term care insurance contracts?

If Yes, include Forms 1099-LTC.

If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job? _____

If Yes, how many months were you covered? _____

If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's long-term care plan at another job? _____

If Yes, how many months were you covered? _____

Education:

Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition? _____

Did you or your spouse pay any student loan interest? _____

Did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren? _____

Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529) plan? _____

If Yes, include all Forms 1099-Q.

If Yes, were the amounts withdrawn used for qualified tuition expenses? _____

Deductions and Credits:

Did you or your spouse contribute property (other than cash) with a fair market value of more than \$5,000 to a charitable organization? _____

If Yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of \$10,000 or less. _____

Did you or your spouse incur any casualty or theft losses? _____

Did you or your spouse make any large purchases, such as motor vehicles and boats? _____

Did you or your spouse incur any casualty or loss attributable to a federally declared disaster? _____

Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle? _____

Did you or your spouse use gasoline or special fuels for business or farm purposes (other than for a highway vehicle)? _____

If Yes, provide the number of gallons or special fuels used for off-highway business purposes.

Gallons _____ Type _____

Did you or your spouse install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells? _____

Did you or your spouse install any energy efficiency improvements or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners, or water heaters? _____

Questions (Page 3 of 5)

	Yes	No
Investments:		
Did you or your spouse have any debts canceled, forgiven or refinanced?	_____	_____
Did you or your spouse start or purchase a business, rental property, or farm, or acquire any new interest in any partnership or S corporation?	_____	_____
Did you or your spouse sell an existing business, rental property, farm, or any existing interest in a partnership or S corporation?	_____	_____
Did you or your spouse sell, exchange, or purchase any real estate?	_____	_____
If Yes, include closing statements.		
Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you or your spouse or dispose of any stock acquired under a qualified employee stock purchase plan?	_____	_____
Did you or your spouse engage in any put or call transactions?	_____	_____
If Yes, provide the transaction details.		
Did you or your spouse close any open short sales?	_____	_____
Did you or your spouse sell any securities not reported on Form 1099-B?	_____	_____
Did you sell or exchange any digital assets? If yes, include all Forms 1099-DA	_____	_____
Retirement or Severance:		
Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?	_____	_____
Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan?	_____	_____
Did you or your spouse turn age 73 and have money in an IRA or other retirement account without taking any distribution?	_____	_____
Did you or your spouse make a qualified charitable distribution directly from an IRA?	_____	_____
Did you or your spouse retire or change jobs?	_____	_____
Did you or your spouse receive deferred, retirement or severance compensation?	_____	_____
If Yes, enter the date received (Mo/Da/Yr). _____		
Personal Residence:		
Did your address change?	_____	_____
If Yes, provide the new address.		
If Yes, did you move to a different home because of a change in the location of your job?	_____	_____
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?	_____	_____
Did you or your spouse withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?	_____	_____
Are your total mortgages on your first and/or second residence greater than \$750,000?	_____	_____
If Yes, provide the principal balance and interest rate at the beginning and end of the year. _____		
Did you or your spouse take out a home equity loan?	_____	_____
Did you or your spouse have an outstanding home equity loan at the end of the year?	_____	_____
If Yes, provide the principal balance and interest rate at the beginning and end of the year. _____		
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?	_____	_____
Did you or your mortgagee receive mortgage assistance payments?	_____	_____
If Yes, include all Forms 1098-MA.		

Questions (Page 4 of 5)

Sale of Your Home:

Yes No

Did you sell your home? _____

Did you receive Form 1099-S? _____

If Yes, include Form 1099-S.

Did you or your spouse own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale? _____

Did you or your spouse ever rent out the property? _____

Did you or your spouse ever use any portion of the home for business purposes? _____

Have you or your spouse sold a principal residence within the last two years? _____

At the time of the sale, the residence was owned by the: _____ Taxpayer _____ Spouse _____ Both _____

Gifts:

Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value in excess of \$19,000 to any individual? _____

Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value? _____

Did you or your spouse make any gifts to a trust for any amount? _____

Did you or your spouse have a life insurance trust? _____

Did you or your spouse assist with the purchase of any asset (auto, home) for any individual? _____

Did you or your spouse forgive any indebtedness to any individual, trust or entity? _____

Foreign Matters:

Did you or your spouse perform any work outside of the U.S. or pay any foreign taxes? _____

Were you or your spouse grantor or transferor for a foreign trust, have any interest in or a signature authority over a bank account, securities account or other financial account in a foreign country? _____

Did you or your spouse create or transfer money or property to a foreign trust? _____

Did you or your spouse own any foreign financial assets? _____

Were you or your spouse subject to the transition tax on undistributed foreign income and elect to pay the tax in installments? _____

Did you or your spouse have an interest in an S corporation that had undistributed foreign income subject to the transition tax? _____

If Yes, did the corporation cease to be an S corporation? _____

If Yes, was there a sale or liquidation of substantially all of the corporation's assets or did the corporation cease business? _____

If Yes, did you or your spouse transfer any share of stock in the corporation? _____

Questions (Page 5 of 5)

Miscellaneous:	Yes	No
Did you or your spouse pay in excess of \$1,000 in any quarter or \$2,800 during the year for domestic services performed in or around your home to individuals who could be considered household employees?	_____	_____
Did you or your spouse receive unreported tip income of \$20 or more in any month?	_____	_____
Have you or your spouse received a punitive damage award for damages other than for physical injuries or illness?	_____	_____
Did you or your spouse engage in any bartering transactions?	_____	_____
Were you or your spouse notified by the IRS or other taxing authority of any changes in prior year returns?	_____	_____
For any trust that you or your spouse created or are trustee, did any beneficiaries, grantors, or trustees die or move?	_____	_____
In 2025, did you or your spouse: (a) receive (as a reward, award, or compensation); (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	_____	_____
In 2025, did you or your spouse receive Payroll Protection Program loan forgiveness or are you or your spouse seeking forgiveness?	_____	_____
If No, enter the date loan forgiveness was denied or that you or your spouse decided not to seek forgiveness. Date (Mo/Da/Yr) _____	_____	_____
If No, enter the amount of the loan for which forgiveness was denied or the amount of the loan for which you or your spouse decided not to seek forgiveness. Amount _____	_____	_____
Do you own an interest in an LLC or similar entity that has a reporting obligation under the Corporate Transparency Act?	_____	_____

Additional state pages have been included at the back of the organizer and should be reviewed.



2025

2025 Tax Return Checklist

Client Name:

	Prior Year	Current Year
Wages (IRS W-2)
Interest Income (IRS 1099-INT)
Dividend Income (IRS 1099-DIV)
Brokerage Statements (Form 1099-A,B,S)
IRA/Pension/Annuity Income (IRS 1099R)
Schedule K-1s (IRS K-1)
Miscellaneous Income and Adjustments (IRS-1099-MISC, NEC, G)
Rent and Royalty Income
Digital Asset Proceeds From Broker Transactions (IRS 1099-DA)

Itemized Deductions:

Medical/Dental Expenses	.....	.....
Real Estate Taxes	.....	.....
Property Taxes	.....	.....
Mortgage Interest (Form 1098)	.....	.....
Charitable Contributions	.....	.....

Other:

Estimated Tax Payments

.....

* Provide any tax related information not listed above, e.g. new brokerage statements, K-1 investments, etc.

Tax Organizer Legend:

Throughout the tax organizer, you will find columns with the heading "TSJ". Enter "T" for taxpayer, "S" for spouse or "J" for joint.



2025

Wages



2025

Interest Income



2025

Dividend Income



2025

Brokerage Statements



2025

IRA/Pension/Annuity Income



2025

Rent and Royalty Income



2025

Schedule K-1 Information



2025

Miscellaneous Income and Adjustments



2025

Itemized Deductions

TSJ	Description	Prior Year Amount	Information Included (X or ✓)

Medical/Dental Expenses:

Real Estate Taxes:

Property Taxes:

Mortgage Interest:

Charitable Contributions:



2025

Federal Tax Payments

20

Refund Application:

If you have an overpayment of 2025 taxes, do you want the excess:

Refunded Yes No
 Applied to your 2026 estimated tax liability Yes No

Federal Estimated Tax Payments:

2025 1st Quarter Estimate (Due 04-15-2025)
 2025 2nd Quarter Estimate (Due 06-17-2025)
 2025 3rd Quarter Estimate (Due 09-16-2025)
 2025 4th Quarter Estimate (Due 01-15-2026)

Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid

2024 overpayment applied to 2025 estimate **Tax Planning Information for Tax Year 2026:**

Do you expect any of the following to occur in 2026?

Yes No

A change in your marital status

Yes No

A change in the number of your dependents

Yes No

A substantial change in your income

Yes No

A substantial change in your withholding

Yes No

A substantial change in deductions

Yes No

If you answered Yes to any of the above questions, provide details.



2025

State and City Tax Payments**20A****State and City Estimated Tax Payments:**

TSJ _____ State/City _____		
Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2025 1st Quarter Estimate		
2025 2nd Quarter Estimate		
2025 3rd Quarter Estimate		
2025 4th Quarter Estimate		

If you have an overpayment of 2025 taxes, do you
want the excess applied to your 2026 estimated tax liability?

Yes No

2024 overpayment applied to 2025 estimate

Balance of prior year(s)' tax paid in 2025 plus
amount paid with 2024 extensions

Estimated tax payments for 2024 paid in 2025

State and City Estimated Tax Payments:

TSJ _____ State/City _____		
Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2025 1st Quarter Estimate		
2025 2nd Quarter Estimate		
2025 3rd Quarter Estimate		
2025 4th Quarter Estimate		

If you have an overpayment of 2025 taxes, do you
want the excess applied to your 2026 estimated tax liability?

Yes No

2024 overpayment applied to 2025 estimate

Balance of prior year(s)' tax paid in 2025 plus
amount paid with 2024 extensions

Estimated tax payments for 2024 paid in 2025

State and City Estimated Tax Payments:

TSJ _____ State/City _____		
Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2025 1st Quarter Estimate		
2025 2nd Quarter Estimate		
2025 3rd Quarter Estimate		
2025 4th Quarter Estimate		

If you have an overpayment of 2025 taxes, do you
want the excess applied to your 2026 estimated tax liability?

Yes No

2024 overpayment applied to 2025 estimate

Balance of prior year(s)' tax paid in 2025 plus
amount paid with 2024 extensions

Estimated tax payments for 2024 paid in 2025