2024 Individual Taxpayer Organizer

(See next page for Organizer)

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Text or Talk: **443-994-3084**

2024 Individual Taxpayer Organizer

Taxpayer						Tax ID # *				
First Name	M.I.	Last	Name	Ema	ail			IP PIN		
Occupation		Date	of birth			Are you no	ew to o	ur firm?	Yes	No
Address		City				State		Zip		
County		Prima	ary phone			Secondary	phone			
Driver's License No.				State	e Issue	Date	E:	xp. Date		
Spouse						Tax ID#*				
First Name	M.I.	Last	Name	Ema	ail	-		IP PIN		
Occupation		Date	of birth			Are you no	ew to o	ur firm?	Yes	No
Address (If different from Taxpayer)		City				State	State Zip			
County		Prima	Primary phone Secondary phone				phone			
Driver's License No.				State	e Issue	Date	E:	xp. Date		
If you moved during 2024, enter your previous address. Date of move										
Marital status on 12/31/24: Single Were you divorced or separated durin <i>Note:</i> Individuals in registered domes	ng the year? Ye		0	We	ere there any	gistered Domes deaths in the fa red married for	mily?	Yes N	lo	
Names of dependent children Child's full name	Tax ID #		IP PIN		Date of birt	Months live	d in	Relationship	(College tudent?
Did any of the children have unearned. Is it anticipated that a different taxpay.					-	the children ha ent for tax year		sability? Yes N	Yes o	No
Other dependents or people who liv	ed with you									
Name	<i>Tax ID # *</i>		IP PIN	D	Date of birth	Months lived in home in 2024		ıtionship	In	соте
				+						
Bank information: Use for Direct d	eposit of refund	Dire	ct debit of bala	nce di	ue <i>Name of</i>	bank				
				Account nu						
Ask your tax preparer for information	about depositing	g a refu	ınd into an IRA	acco	unt or splitti	ng the deposit i	nto mo	re than on	e acc	ount.
*A Tax ID # is a Social Security Number (SS	N), adoption taxpay	yer iden	tification number	r (ATI	N), or an indiv	ridual taxpayer id	entificat	ion number	(ITI)	۷).

	Yes	No	Are either would ar wou	, 1 1 J	u are unsure	1					
-	Yes	No	Are either you or your spouse legally blind? Have you received any notice from the IRS or state revenue department within the past year? If yes, provide a copy.								
_	Yes	No	Did you pay or receired as Paid Received	ve alimony in 2024?	Recipient's		Date of divorce or separation				
	Yes	No		alth insurance through a pu	blic exchang	e/marketplace? (Provic	e Form 1095-A.)				
XES	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?								
8	Yes	No	Did you pay anyone	in your home?							
1 1 1	Yes	No	Did you purchase an								
LIFESTYLE & IAKES	Yes	No	Are you involved in	g credit cards) cancelled?							
	Yes	No	Are you a member of								
	Yes	No	Were you a citizen of	or did you live in a foreign	country?	Foreign country					
	Yes	No	Do you own or have	financial interest in a foreign	n bank or fin	ancial account? Maxim	um value in 2024 \$				
	Yes	No	Would you like to all Designee's name	ow your tax preparer or and Ph	ther person one number	to discuss your return v	vith the IRS? PIN (any five digits)				
	Yes	No	Were any children bo	orn or adopted in 2024? (Prov	vide statement	t for other expenses.)					
	Yes	No	Were any children at	tending college? (Provide For	m 1098-T and	d Form 1098-E.)					
			Year in college	Paid by you: Tuition \$		Books \$	Student loan interest \$				
CHILDREN & EDUCATION				Paid by student: Tuition \$		Books \$	Student loan interest \$				
200	Yes	No	Did you pay any tuit	ion for a private school for a	dependent	or take classes yourself	?				
5			Student				Amount paid \$				
-			Name and address of school								
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable)								
		Name of provider				_	EIN or SSN				
L			Address Amount paid \$								
	Yes	No	Did you make any co	ontributions to a 529 plan in	2024? If yes,	provide details.					
L	Yes	No	1	contribute any money to an			Traditional IRA Roth IRA				
L	Yes	No	Did you roll over any amounts from a retirement account in 2024?								
2	Yes	No	-	fer any stock or sell rental or		property?					
INVESTIMENTS	Yes	No	-	income from an installment							
-	Yes	No	-	vestments become worthless			theft in 2024?				
-	Yes	No		did you exercise, any emple	-						
	Yes	No		as a reward, award, or paym a financial interest in a digita		erty or services); or (b) s	call avchange or otherwise dispos				
					Lasset): (1219	gital assets include crypto					
	Yes	No					currencies, NFTs, and stablecoins)				
20	Yes Yes	No No	Did you, or do you p	lan to, contribute money by	April 15, 202	25 to an HSA for 2024? 1	currencies, NFTs, and stablecoins) f yes, provide details.				
- Indiana			Did you, or do you p Did you pay any inte		April 15, 202 RV that has li	25 to an HSA for 2024? I ving quarters? If yes, p	of yes, provide details.				
DEDUCTIONS	Yes	No	Did you, or do you p Did you pay any inte Did you pay sales ta	lan to, contribute money by erest on a loan for a boat or F	April 15, 202 RV that has li 024, such as	25 to an HSA for 2024? I ving quarters? If yes, pr a vehicle, boat, or home	of yes, provide details.				
_	Yes	No No	Did you, or do you p Did you pay any inte Did you pay sales ta: Did you make any ch	plan to, contribute money by erest on a loan for a boat or F exes on a major purchase in 20	April 15, 202 RV that has li 024, such as 24? If yes, pro	25 to an HSA for 2024? It ving quarters? If yes, post a vehicle, boat, or home ovide details.	of yes, provide details.				
_	Yes Yes Yes	No No	Did you, or do you p Did you pay any inte Did you pay sales ta Did you make any ch Did you work from a	plan to, contribute money by erest on a loan for a boat or F exes on a major purchase in 20 naritable contributions in 202	April 15, 202 RV that has li 024, such as 24? If yes, pro- for your bus	25 to an HSA for 2024? It ving quarters? If yes, proposed a vehicle, boat, or home ovide details.	currencies, NFTs, and stablecoins) If yes, provide details. rovide details.				
	Yes Yes Yes	No No No	Did you, or do you p Did you pay any inte Did you pay sales ta: Did you make any ch Did you work from a Did you receive inco	plan to, contribute money by erest on a loan for a boat or F xes on a major purchase in 20 naritable contributions in 202 n home office or use your car	April 15, 202 RV that has li 024, such as 24? If yes, pro- for your bus omy activity	25 to an HSA for 2024? It ving quarters? If yes, post a vehicle, boat, or home ovide details. siness? (e.g. Airbnb, Uber, etc.)	f yes, provide details. rovide details. ??				
	Yes Yes Yes Yes Yes	No No No No	Did you, or do you p Did you pay any inte Did you pay sales ta: Did you make any cl Did you work from a Did you receive inco Do you own a busine	plan to, contribute money by erest on a loan for a boat or R xes on a major purchase in 20 naritable contributions in 202 n home office or use your car me from a sharing/gig econ	April 15, 202 W that has li 024, such as 24? If yes, pro- for your bus comy activity rship, corpor	25 to an HSA for 2024? It ving quarters? If yes, post a vehicle, boat, or home ovide details. Siness? (e.g. Airbnb, Uber, etc.) attion, LLC, farming action.	f yes, provide details. rovide details. ?? o? ivities, or other venture?				
DOSIMESS	Yes Yes Yes Yes Yes Yes Yes	No No No No No	Did you, or do you p Did you pay any inte Did you pay sales tax Did you make any ch Did you work from a Did you receive inco Do you own a busine Did you purchase or	plan to, contribute money by erest on a loan for a boat or Fixes on a major purchase in 20 naritable contributions in 2021 home office or use your car me from a sharing/gig econess or an interest in a partner sell a main home during the	April 15, 202 RV that has li 024, such as 24? If yes, pro- for your bus omy activity eship, corpor year? If yes,	25 to an HSA for 2024? It ving quarters? If yes, post a vehicle, boat, or home ovide details. siness? (e.g. Airbnb, Uber, etc., ration, LLC, farming act provide closing statements)	f yes, provide details. rovide details. ?? o? ivities, or other venture?				
BUSINESS	Yes Yes Yes Yes Yes Yes Yes Yes	No No No No No	Did you, or do you p Did you pay any inte Did you pay sales ta: Did you make any ch Did you work from a Did you receive inco Do you own a busine Did you purchase or If you sold a home, d	plan to, contribute money by erest on a loan for a boat or Fixes on a major purchase in 20 naritable contributions in 2021 home office or use your car me from a sharing/gig econess or an interest in a partner sell a main home during the	April 15, 202 RV that has licated that	25 to an HSA for 2024? It ving quarters? If yes, post a vehicle, boat, or home ovide details. siness? (e.g. Airbnb, Uber, etc., ration, LLC, farming act provide closing statements.)	f yes, provide details. rovide details. ?? provide details. ?? provide details.				
BUSINESS	Yes Yes Yes Yes Yes Yes Yes Yes Yes	No	Did you, or do you p Did you pay any inte Did you pay sales tax Did you make any ch Did you work from a Did you receive inco Do you own a busine Did you purchase or If you sold a home, d Did you refinance a r	elan to, contribute money by erest on a loan for a boat or Fixes on a major purchase in 20 a home office or use your car me from a sharing/gig econess or an interest in a partner sell a main home during the lid you claim the First-Time I mortgage or take a home equ	April 15, 202 RV that has lifted that had been supported to the hard has lifted that had been supported to the hard had been supported to the	25 to an HSA for 2024? It ving quarters? If yes, post a vehicle, boat, or home ovide details. Siness? (e.g. Airbnb, Uber, etc.) attion, LLC, farming act provide closing statemed Credit when it was pure yes, provide closing statemed yes.	f yes, provide details. rovide details. ?? provide details. ?? provide details.				
BUSINESS	Yes	No	Did you, or do you p Did you pay any inte Did you pay sales tay Did you make any ch Did you work from a Did you receive inco Do you own a busine Did you purchase or If you sold a home, d Did you refinance a n Did you use any more	elan to, contribute money by erest on a loan for a boat or Fixes on a major purchase in 20 a home office or use your car me from a sharing/gig econess or an interest in a partner sell a main home during the lid you claim the First-Time I mortgage or take a home equ	April 15, 202 RV that has lifted that has lifted to the second of the s	ving quarters? If yes, provide details. siness? (e.g. Airbnb, Uber, etc.) ration, LLC, farming act provide closing stateme Credit when it was pure yes, provide closing state than to buy, build, or su	f yes, provide details. frovide details.				
HOIME BOSINESS DEDUCTIONS	Yes	No N	Did you, or do you p Did you pay any inte Did you pay sales tax Did you make any ch Did you work from a Did you receive inco Do you own a busine Did you purchase or If you sold a home, d Did you refinance a r Did you use any mor	elan to, contribute money by erest on a loan for a boat or Fixes on a major purchase in 20 a home office or use your car me from a sharing/gig econess or an interest in a partner sell a main home during the aid you claim the First-Time I mortgage or take a home equetgage loan proceeds for purew energy-efficient improver	April 15, 202 RV that has lifted that has lifted to the second of the s	ving quarters? If yes, provide details. siness? (e.g. Airbnb, Uber, etc.) ration, LLC, farming act provide closing stateme Credit when it was purc yes, provide closing state than to buy, build, or su ur home? If yes, provide	f yes, provide details. frovide details.				
HOME	Yes	No N	Did you, or do you p Did you pay any inte Did you pay sales tax Did you make any ch Did you work from a Did you receive inco Do you own a busine Did you purchase or If you sold a home, d Did you refinance a r Did you use any mor	erest on a loan for a boat or Fixes on a major purchase in 20 a home office or use your car me from a sharing/gig economics or an interest in a partner sell a main home during the fid you claim the First-Time I mortgage or take a home equating equation of the company of the c	April 15, 202 RV that has lice of the control of t	ving quarters? If yes, provide details. siness? (e.g. Airbnb, Uber, etc.) ration, LLC, farming act provide closing stateme Credit when it was purc yes, provide closing state than to buy, build, or su ur home? If yes, provide	f yes, provide details. rovide details. ?? ivities, or other venture? ent. chased? If yes, provide details. tement. bstantially improve your home? details.				

Income Worksheet

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

Indicat	e "T" for taxpayer, "S" for spouse, "J" for joint		-	Pro	vide additional staten	nents if m	ore 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	fissuer		
	1)			4)			
	2)			5)			
	3)			6)			
Forms	1099-DIV—Dividends and Distributions						
T/S/J	Name of issuer		T/S/J	Name of issuer			
	1)			4)			
	2)			5)			
	3)			6)			
Forms	1099-R—Distributions From Pensions, Annuities, Ret	iremen	t or Profit	-Sharing I	Plans, IRAs, Insurance	e Contrac	ts, Etc.
T/S	Name of issuer		T/S	Name of issuer			
	1)			4)			
	2)			5)			
	3)			6)			
If the d	istribution is before age 59½, give a reason to determin	ne if an	exception	to penalty	applies.		
Tax-Ex	empt Interest (such as municipal bonds—include state	ement)					
Payer	\$		Payer \$			\$	
Other l	Income						
State ta	x refund	\$			Unreported tips	\$	
Unemp	ployment compensation	\$			Other	\$	
Social S	Security (taxpayer) — provide SSA-1099 or RRB-1099	\$				\$	
Social S	Security (spouse)—provide SSA-1099 or RRB-1099	\$				\$	

Sales and Exchanges Worksheet

Business income (see Sole Proprietorship Tax Organizer)

Rental income (see Rental Property Tax Organizer)

Gambling income—provide Form W-2G

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

Stock sales

Sale of other property

See "Sales and Exchanges Worksheet" below.

Description of property	Purchase date	Cost/basis	Sale 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).

Itemized Deductions Worksheet

Deductions must exceed \$14,600 Single, \$29,200 MFJ/QSS, \$21,900 HOH, or \$14,600 MFS to be a tax benefit.

Medical Expenses. Must exceed 7.5% of income to be a benefit—include cost for dependents—do not include any expenses that were reimbursed by insurance or paid with funds from an FSA, HSA, or HRA.			Charitable Contributions. If over \$500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all contributions.						
Dentists	\$	Hospitals	\$	Monetary (cash, check, credit card) \$					
Doctors	\$	Insurance	\$	Noncash contributions (FMV). Clothing or household					
Equipment	\$	Prescriptions	\$	items must be in good used condition or better. \$					
Eyeglasses	\$	Other	\$	Did you transfer funds from an IRA directly to a					
Medical miles	:	@ 21¢		charity? Yes No			\$		
Taxes Paid. Do not include taxes paid for full or partial busines rental-use property, including business use of the home.			al business or e.	Charitable mileage @ 14¢ Casualty and Theft Losses					
State withhold			Reported on W-2			ected damage or loss			
State estimated taxes—paid in 2024		\$	a theft in a federally-declared disaster area, provide details to your preparer. Yes No						
Real estate tax	-		\$	1		ions. Miscellaneous	itamizad		
Real estate tax—other			\$	deductions subject					
Personal property taxes			\$	federal return. How	ted expenses,				
Property tax refund—received in 2024			\$()	provide information					
Foreign tax paid			\$	by your employer? Yes No					
Other			\$	Dues \$ Subscriptions		\$			
Other			\$	Investment	\$	Supplies	\$		
Other			\$	expenses					
Balance paid i	n 2024 from prior ye	ear state returns		Job education	\$	Tax prep fees	\$		
	e interest or penalti		\$	Job seeking	\$	Tools	\$		
		x paid during 2024?	Yes No	Legal fees	\$	Uniforms	\$		
		at, or home in 2024? vaid \$ Dat	Yes No	Licenses	\$	Union dues	\$		
Sales tax paid		,		Safety equipment	\$	Other	\$		
use or rental-u	ise property, includi	erest paid for full or j ing business use of th ion and ID numbers.		Other Deduction AGI limitation.	s. The following	deductions are not s	ubject to the 2%		
Main home		Equity loan	\$	Gambling losses	\$	Federal estate tax on IRD	\$		
Second home	\$	Equity loan	\$	Impairment-	\$	Other	\$		
Points	\$	Investment interest	\$	related expenses					
Points	\$		\$	1	*	Otner	*		

- **Notes:** Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.
 - Work clothing is not deductible if adaptable for every day wear. Exception for safety equipment, such as steel-toe boots.
 Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible.

Adjustments Worksheet

\$
\$
\$
\$
\$
\$
\$
Ask preparer
Ask preparer
\$

Estimated Tax Payments — Tax Year 2024						
Installment	Date paid	Federal	Date paid	State		
First		\$		\$		
Second		\$		\$		
Third		\$		\$		
Fourth		\$		\$		
Amount applied from 2023 overpayment		\$		\$		
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/marketplace), 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, sold, or refinanced real estate.

Mileage amounts for any automobile expenses claimed, including total mileage, commuting 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 2024.

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 returns 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 returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are 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 may be required for preparation of 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 duplicate 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 payment. 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 express written 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.