2025 Individual Tax Organizer

SECTION 1 - PERSONAL INFORMATION

Primary Taxpayer		**Spouse**	
First Name, MI :		**First Name, MI :**	
Last Name:		**Last Name:**	
Date of Birth:		**Date of Birth:**	
Cell Phone #:		**Cell Phone #:**	
Email Address:		**Email Address:**	
Occupation:		**Occupation:**	
Driver's License:	**State:**	**Driver's License:**	**State:**
Number:		Number:	
Issue Date:		Issue Date:	
Expiration Date:		Expiration Date:	

Mailing Address:

Street: _____ Apt/Unit: _____

City: _____ State: _____ Zip Code: _____

IRS Identity Protection PIN # (if any) _____ **(Provide copy of letter)**

IRS Identity Protection PIN # (if any) _____ **(Provide copy of letter)**

Mark all that apply		**Mark all that apply**	
Legally Blind?		Legally Blind?	
Full-Time Student?		Full-Time Student?	
Dependent of Another Person?		Dependent of Another Person?	

Date of Death: _____ **Date of Death:** _____

SECTION 2 - DEPENDENTS (only include those claimed this year)

	Dependent 1	**Dependent 2**	**Dependent 3**
First Name:			
Last Name:			
Relationship:			
Date of Birth:			
Under 24 & Fulltime Student?	☐	☐	☐

SECTION 3 - BANKING INFORMATION

Bank Name: _____

Routing Number: _____

Account Number: _____

Refund Preference

☐ Direct Deposit

☐ Paper Check

Type of Account: ☐ Checking ☐ Savings

SECTION 4 - ESTIMATED TAX PAYMENTS

Tax Period	Federal Date Paid	Federal Amount	State: _____ Date Paid	State: _____ Amount
Prior Year Overpayment	[redacted]		[redacted]	
Qtr 1				
Qtr 2				
Qtr 3				
Qtr 4				
Additional Payment				

SECTION 5 - INCOME SOURCES

	Number of Forms		Number of Forms
☐ Employment (W-2)		☐ Rent (1099-MISC)	
☐ Retirement distribution (1099-R)		☐ Royalties (1099-MISC)	
☐ Social Security (SSA-1099)		☐ ESA or 529 distribution (1099-Q)	
☐ Self-Employment (1099-NEC or 1099-K)		☐ HSA or MSA distribution (1099-SA)	
☐ State or Local Tax Refund (1099-G)		☐ Partnership (Schedule K-1)	
☐ Unemployment Compensation (1099-G)		☐ S-Corporation (Schedule K-1)	
☐ Interest (1099-INT)		☐ Estate or Trust (Schedule K-1)	
☐ Dividends (1099-DIV)		☐ Gambling (W-2G)	
☐ Sold Stocks or Investments (1099-B)		☐ Farming	
☐ Cancelled Debt (1099-C)		☐ Other: _____	

SECTION 6 - ADJUSTMENTS AND CREDITS

- ☐ Higher Education Expenses (1098-T)
- ☐ Child or Dependent Care expenses
- ☐ HSA contributions
- ☐ IRA contributions
- ☐ Student loan interest
- ☐ Educator expenses
- ☐ Energy efficient home improvements
- ☐ Adoption expenses
- ☐ Alimony paid Date of divorce _____
- ☐ Household employee expenses
- ☐ Armed Forces moving expenses
- ☐ Donations to charity
  - cash: $_____
  - non-cash: $_____

SECTION 7 - QUESTIONNAIRE

Yes	No	
		Personal Information
☐	☐	Did your marital status change during the year?
☐	☐	Did taxpayer, spouse or dependent change name with SSA?
☐	☐	Could you be claimed as dependent by another person?
		Dependents
☐	☐	Did you have child under age 19 or full-time student under age 24, with interest and dividend income?
☐	☐	Did you have a baby or adopt a child?
		Education
☐	☐	Did you receive distribution from Ed Savings Acct?
☐	☐	Did you incur tuition expenses to attend college, university or vocational school?
		Retirement Plans
☐	☐	Did you make a contribution to retirement plan?
☐	☐	Did you receive a distribution from a retirement plan or convert traditional IRA to Roth IRA?
☐	☐	Did you transfer or rollover funds to another plan?

Yes No

Health Insurance Coverage

- ☐ ☐ Did you receive IRS Form 1095-A (Health Insurance Marketplace Statement)? If yes, provide copy of form.
- ☐ ☐ If you lived in CA, DC, MA, NJ, or RI, did you have health insurance coverage for the entire year?

Financial Events

- ☐ ☐ Did you receive unreported tip income of $20 or more?
- ☐ ☐ Did you receive any overtime pay?
  Job code or description _____
- ☐ ☐ Did you receive any disability income?
- ☐ ☐ Did you have any foreign income or pay any foreign taxes?
- ☐ ☐ Did you start a business or farm, purchase rental or royalty property, or acquire an interest in Partnership, S-Corp, trust or REMIC?
- ☐ ☐ Did you sell or refinance a home or rental property?
- ☐ ☐ Did you receive, sell, exchange, gift or otherwise dispose of a digital asset?
- ☐ ☐ Did you make any residental energy efficient improvements involving solar, wind, geothermal or fuel cell energy?
- ☐ ☐ Did you have any debts cancelled or forgiven?

Yes No

Miscellaneous

- ☐ ☐ Did you or your spouse make gifts to an individual totaling more than $19,000?
- ☐ ☐ Did you have a financial interest in or signature authority over a foreign account or trust?
- ☐ ☐ May IRS discuss your return with your preparer?
- ☐ ☐ Did you receive notice or letter from IRS or state agency?

ADDITIONAL INFORMATION OR QUESTIONS