

Thank you for choosing our tax preparation services. **Please be sure to organize all of your tax documents prior to completing this form. For any questions answered YES, include supporting documents or details.**

Review our [Tax Preparation Checklist](#) to organize the documents you may need.

Important:

- Please take time to complete all sections of this form. **You are responsible for the information on your return. Please provide complete and accurate information.**
- Upload a copy of Social security cards or ITIN Letters of all personal on your return.
- Upload a copy of your Pictured ID (Valid Driver's License or State ID) for you and your spouse if you have one.

This organizer and any further information required on your return must be completed and submitted no later than March 31, 2025 to meet the tax filing deadline. Any information received after this date may result in filing an extension of your tax return.

Part I – Your Personal Information (If you are filing a joint return, enter your names in the same order as last year's return)

| Information Required | Tax Payer | Spouse |
|---|-----------|--------|
| First Name | | |
| Middle Initial | | |
| Last Name | | |
| SSN/ITIN | | |
| Are you a U.S. Citizen? | | |
| Date of Birth (mm/dd/yyyy) | | |
| Job Title | | |
| Email Address | | |
| Phone Number | | |
| Mailing Address | | |
| Last year, were you a full-time student? | | |
| Last year, were you totally & permanently disabled? | | |
| Last year, were you legally blind? | | |
| Can anyone claim you as a dependent? | | |
| Have you been a victim of tax related identity theft or been issued an Identity Protection PIN? | | |

Part II – Marital Status

| | |
|---|--|
| As of December 31, 2024, what was your marital status? | |
| If Married, did you live with your spouse during any part of the last six months of 2024? | |
| If Divorced, provide the date of final decree (mm/dd/yyyy) | |
| If Legally Separated, provide the date of separate maintenance decree (mm/dd/yyyy) | |
| If Widowed, year of spouse's death | |

Part III – Dependents Information

List the details below of: * everyone who lived with you in 2024 * anyone you supported but did not live with you in 2024.
Do not enter your name or your spouse's name below.

| Information Required | Dependent 1 | Dependent 2 | Dependent 3 | Dependent 4 | Dependent 5 |
|---|-------------|-------------|-------------|-------------|-------------|
| Name (first, last) | | | | | |
| Date of Birth (mm/dd/yyyy) | | | | | |
| Relationship to you (ex: son, daughter, parent, etc.) | | | | | |
| SSN/ITIN | | | | | |
| # of months lived in your home in 2024 | | | | | |
| US Citizen/Resident of Canada or Mexico | | | | | |
| Single or Married as of 12/31/2024 | | | | | |
| Full-time student in 2024? | | | | | |
| Totally and permanently disabled? | | | | | |
| Income (if any) | | | | | |
| Is the dependent filing their taxes? | | | | | |

Please answer the below questions to determine if you are eligible for Child Tax Credit, Additional Child Tax Credit and/or Other Dependent Credit. **Do you certify that all answers are to the best of your knowledge, true, correct, and complete?** Yes No

- Can anyone other than you claim the dependents listed above on their tax return? **Yes** **No**
- Did you provide more than 50% of the living expenses for the dependents listed above? **Yes** **No**
- Did the dependents listed above live with you for all 12 months during the tax year? **Yes** **No**
If not, provide details on the additional comments section at the end of this document.
- List & upload (to portal) the type of supporting documents you have to prove the above statements? Examples: School Records, health insurance, or similar.

| Part IV – Income – Last Year. Check the appropriate box for each question in each section below (UPLOAD the supporting documents for all questions answered YES) | | | | |
|---|--------|-----|----|--------------|
| Did You (or Your Spouse) Receive | | YES | NO | Unsure/Notes |
| 1) Wages or Salary? (Form W-2) If yes, how many jobs did you have last year? You | Spouse | | | |
| 2) Did you have income from multiple states? If yes, provide the number of States | | | | |
| @) #) 7 @u) @ | | | | |
| @ # 8 0 7 0 " \ @ | | | | |
| 4 | | | | |
| y # k o O @ u 7 8 | | | | |
| 7) Tip Income (not reported on W2 form) and/or Bartering Income? (Form 1099-B) | | | | |
| 8) Alimony income or separate maintenance payments? | | | | |
| 9) Self-Employment income or Hobby Income? (Forms 1099-Misc, 1099-NEC, 1099-K, Cash, or Other property or services) | | | | |
| 10) Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099) | | | | |
| 11) Scholarships (Forms W-2, 1098-T, 1042-S) or Education Savings Account withdrawal (Form 1099-Q)? | | | | |
| 12) Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2) | | | | |
| 13) Retirement Income or Payments/Distributions from Pensions, Annuities and/or IRA? (Form 1099-R) | | | | |
| 14) Income (or loss from Rental Property)? | | | | |
| 15) Income from Partnership, LLC, Estate, Trust Income, S Corp.? (Form Schedule K-1, W-2) | | | | |
| 16) Did you make any gifts during the year directly or in trust exceeding \$18,000 per person? | | | | |
| 17) Other Income? (In cash, check, gambling, lottery, prizes, awards, jury duty, royalties, foreign income, etc.) <i>Specify details in Additional Comments.</i> | | | | |

| Part V – Expenses – Last Year. Check the appropriate box for each question in each section below (UPLOAD the supporting documents for all questions answered YES) | | | | |
|--|--|-----|----|--------------|
| Did You (or Your Spouse) Pay | | YES | NO | Unsure/Notes |
| 1) Alimony or separate maintenance payments? If yes, do you have the recipient's SSN? | | | | |
| 2) Contributions to a retirement account? 401K IRA Roth IRA Other | | | | |
| College or post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T) | | | | |
| 4) Deductions: Medical & Dental Expenses Taxes (State, Real Estate/Property, Sales) Mortgage Interest (Form 1098) Charitable Contributions (Cash/Non-Cash) | | | | |
| 5) For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.? | | | | |
| 6) Expenses related to self-employment income or any other income you received? | | | | |
| 7) Student loan interest? (Form 1098-E) | | | | |
| 8) Purchase and install energy-efficient home items? (such as windows, doors, air conditioner, furnace, insulation, solar panel, etc.) Attach receipts. | | | | |
| 9) Purchase of Electric Vehicle or Hybrid Vehicle. | | | | |
| 10) Child or Dependent care expenses such as daycare? (MUST COMPLETE the Day Care Expense section below) | | | | |

| Part VI – Health Care Coverage – Last Year. Check the appropriate box for each question below (UPLOAD the supporting documents for all questions answered YES) | | | | |
|---|--|-----|----|--------------|
| Did You (or Your Spouse) Pay | | YES | NO | Unsure/Notes |
| 1) Have health care coverage for all 12 months? | | | | |
| 2) Received one or more of these forms? Form 1095-B Form 1095-C | | | | |
| Purchased health insurance coverage through the Marketplace (Exchange)? [Provide Form 1095-A] | | | | |
| 3a) If yes, were advance credit payments made to help you pay your health care premiums? | | | | |
| 3b) If yes, is everyone listed on your Form 1095-A being claimed on this tax return? | | | | |
| 4) Have an exemption granted by the Marketplace? | | | | |
| 5) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12) | | | | |
| 5a) If yes, did you use any amount from your HSA to pay your medical expenses? If yes, provide FORM 1099SA. | | | | |

| Part VII – Life Events – Last Year. Check the appropriate box for each question in each section below (UPLOAD the supporting documents for all questions answered YES) | | | | |
|---|--|-----|----|--------------|
| Did You (or Your Spouse) Pay | | YES | NO | Unsure/Notes |
| 1) Have credit card or mortgage debt canceled/forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A) | | | | |
| 2) Adopt a child? | | | | |
| Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year? | | | | |
| 4) Live in an area that was declared a Federal disaster area? If yes, where? | | | | |
| 5) Receive the First Time Homebuyers Credit in 2008? | | | | |
| 6) Make estimated tax payments or apply last year's refund to this year's tax? If yes, how much did you pay in 2024 for: Federal State | | | | |
| 7) File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D? | | | | |
| 8) Received a letter from the IRS? | | | | |

| Part VIII – Foreign Income – Last Year. Check the appropriate box for each question in each section below (UPLOAD the supporting documents for all questions answered YES) | | | | |
|---|--|-----|----|--------------|
| Did You (or Your Spouse) Pay | | YES | NO | Unsure/Notes |
| 1) Have income outside USA? (Wages, Bank Interest, Dividend, Investment Income, Rental Income, any other form. Provide details in additional comments section. | | | | |
| 2) During the tax year did you have an aggregated value of \$10,000 or more on foreign financial accounts? | | | | |
| 2a) If YES to the above, do you want us to prepare the FBAR filing for you? [There is an additional fee for filing FBAR] | | | | |
| 3) Do the following apply to you? You must file form 8938 along with your return, if you are - - single or married filing separately, and had \$50,000 on the last day of tax year or more than \$75,000 any time during the year (OR) - married and had \$100,000 on the last day of the tax year or \$150,000 anytime during the year on your foreign financial accounts. | | | | |

