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TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name	.	Last name	.
First name		First name	
Middle Initial	Suffix	Middle Initial	Suffix
Social security number		Social security number	
Occupation		Occupation	
Work phone	Ext	Work phone	Ext
Cell phone		Cell phone	
E-mail address		E-mail address	
Date of birth		Date of birth	

Address .... Apartment number.......
City .... State........... ZIP Code.......
Home phone........ Fax number ....

Dependent Information

First name / Last name	MI / Suffix	Social Security Number / Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

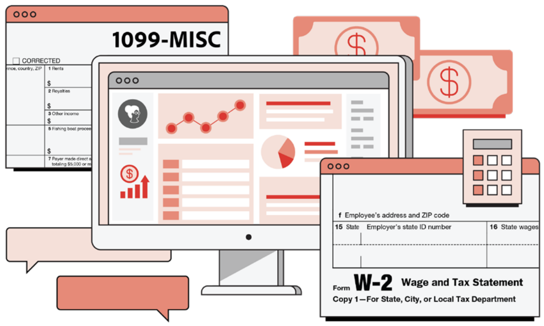
Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2024 qualified student loan interest..

1555 REV 09/27/24 PRO

Income sources



Rental income

- [ ] Records of income and expenses
- [ ] Rental asset information (cost, date placed in service, etc.) for depreciation
- [ ] Record of estimated tax payments made (Form 1040-ES)

Retirement income

- [ ] Pension, IRA, or annuity income (1099-R)
- [ ] Traditional IRA basis (e.g., amounts you contributed to the IRA that were already taxed)
- [ ] Social Security or RRB income: SSA-1099, RRB-1099

Savings and investments or dividends

- [ ] Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- [ ] Income from sales of stock or other property (1099-B, 1099-S)
- [ ] Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- [ ] Health Savings Account (HSA) and long-term care reimbursements (1099-SA or 1099-LTC)
- [ ] Expenses related to your investments
- [ ] Record of estimated tax payments made (Form 1040-ES)
- [ ] Transactions involving cryptocurrency

Employed

- [ ] Form W-2

Unemployed

- [ ] Unemployment (1099-G)

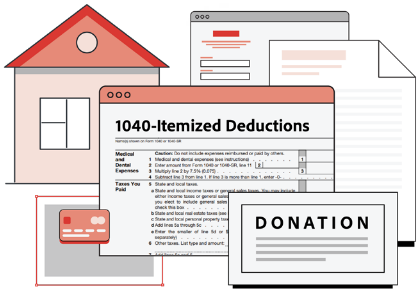
Self-employed

- [ ] Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or 1099-NEC
- [ ] Records of all expenses — check registers, credit card statements, and receipts
- [ ] Business-use asset information (cost, date placed in service, etc.) for depreciation
- [ ] Home office information, if applicable
- [ ] Record of estimated tax payments made (Form 1040-ES)

Other income and losses

- [ ] Payment card and third-party network transactions (1099-K)
- [ ] Gambling income (W-2G or records showing income, as well as expense records)
- [ ] Jury duty records
- [ ] Hobby income and expenses
- [ ] Prizes and awards
- [ ] Trust income
- [ ] Royalty income (1099-MISC)
- [ ] Any other 1099s received
- [ ] Record of alimony paid or received with ex-spouse's name and SSN
- [ ] State tax refund

Types of deductions



Homeownership

- [ ] Forms 1098 or other mortgage interest statements
- [ ] Real estate and personal property tax records
- [ ] Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
- [ ] All other 1098 series forms

Charitable donations

- [ ] Cash amounts donated to houses of worship, schools, or other charitable organizations
- [ ] Records of non-cash charitable donations
- [ ] Amounts of miles driven for charitable or medical purposes

Medical expenses

- [ ] Amounts paid for healthcare, insurance
- [ ] Amounts paid to doctors, dentists, and hospitals
- [ ] Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer-provided plan

Health insurance

- [ ] Form 1095-A if you enrolled in an insurance plan through the Marketplace

K–12 educator expenses

- [ ] Receipts for classroom expenses (for educators in grades K–12)

Child-care expenses

- [ ] Fees paid to a licensed day-care center or family day-care center for care of an infant or preschooler
- [ ] Amounts paid to a babysitter or care provider for your child (under age 13) while you work
- [ ] Expenses paid through a dependent care flexible spending account at work

Educational expenses

- [ ] Forms 1098-T from educational institutions
- [ ] Receipts that itemize qualified educational expenses
- [ ] Records of any scholarships or fellowships you received
- [ ] Form 1098-E if you paid student loan interest

State and local taxes

- [ ] Amount of state and local income or sales tax paid (other than wage withholding)
- [ ] Invoice showing amount of vehicle sales tax paid and/or personal property tax on vehicles

Retirement and other savings

- [ ] Form 5498-SA showing HSA contributions
- [ ] Form 5498 showing IRA contributions
- [ ] All other 5498 series forms (5498-QA, 5498-ESA)

Federally declared disaster

- [ ] Proof of city or county you lived, worked, or had property in
- [ ] Records to support property losses (appraisal, clean-up costs, etc.)
- [ ] Records of rebuilding or repair costs
- [ ] Insurance reimbursements or claims to be paid
- [ ] FEMA assistance information

CHECK ALL THE APPLY FOR THE TAX YEAR

TAXPAYER(S)

- ☐ Did your marital status change?
- ☐ Did your address change?
- ☐ Did your contact information change? Cell number? email address?
- ☐ Did you get an Identity Protection PIN (IRS IP PIN) from the IRS?
- ☐ Were you or your spouse permanently and/or totally disabled during the year?
- ☐ Did you start or receive any disability payments?

DEPENDENTS

- ☐ Did you provide over half the support for any other person? List them in your organizer.
- ☐ Do you have dependents who must file?
- ☐ Do you have children who are under age 19 or a full-time student under age 24 with investment income greater than $2,600?
- ☐ Do you have children who attend college and have education expenses?
- ☐ Do you have children under the age of 13 with childcare expenses?
- ☐ Did you incur adoption expenses?
- ☐ Do you expect your income and deductions to be the same as last year?

INCOME

- ☐ Did you bring your last paystub with your W2?
- ☐ Did you receive tip income NOT reported to your employer? ______________________
- ☐ Do you use Venmo, PayPal, Square or Stripe? Did you receive a 1099-K?
- ☐ Do you sell on Etsy, eBay, Mecari, Poshmark, Depop or Whatnot? Receive a 1099-K?
- ☐ Did a lender cancel any of your debt? (Attach any Forms 1099-A or 1099-C)
- ☐ Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days?
- ☐ Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property? Attach closing and/or escrow statements, 1099-C or 1099-A forms.
- ☐ If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?
- ☐ Did you have gambling or lottery winnings reported on a 1099-G?
- ☐ Did you buy or sell any stocks or bonds? Attach 1099-B statement(s)
- ☐ Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?
- ☐ At any time during the year, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in digital asset)? Do you have a 1099-DA? Please use an online source to prepare your 8949 for trades such as cryptotax.com.
- ☐ Did you receive any additional income not included in this Tax Organizer?

EXPENSES

- ☐ Did you incur any non-business bad debts?
- ☐ Did you pay any individual for domestic services?
- ☐ Did you take a retirement account distributions related to a natural disaster?
- ☐ Active military client, did you incur any moving expenses?
- ☐ Did you make energy efficient improvements to your home?
- ☐ Did you purchase a vehicle and have a loan on that vehicle? Attach interest statement.
- ☐ Did you purchase a hybrid or electric vehicle? If yes, please attach form 8936.
- ☐ Did you donate a vehicle? If yes, attach Form 1098C.
- ☐ Did you incur any casualty losses in an area with a presidential disaster declaration and an assigned FEMA number? Do you have your insurance settlement or denial?
- ☐ Did you receive Form 1095-A (Health Insurance Marketplace Statement)?
- ☐ If you paid any alimony, please report recipient's SSN, Alimony amount and date of divorce decree. ____

REFUND(S) and ESTIMATE(S)

- ☐ Estimated payments made for the year:

Date	Federal	State1	State2
April Q1			
June Q2			
Sept Q3			
Jan Q4			

- ☐ Did you receive a notice from either the Internal Revenue Service or Missouri Department of Revenue adjusting your refund rollover amount for this year?
- ☐ If you have an overpayment of taxes resulting in a refund, do you want the excess applied to your estimated tax for next year instead of being refunded?
- ☐ Would you like us to prepare estimated quarterly tax vouchers for the coming year?

Beginning October 1, 2025, all federal refunds from the Department of Treasury are required to be direct deposit. Please attach a VOIDED check for your refund(s).