

Tax Organizer

For Tax Year 2024

Name:

Taxpayer _____ SS No. _____ Birth date/Age _____

Spouse _____ SS No. _____ Birth date/Age _____

Address: _____ Telephone (Home) (____) _____
_____ Telephone (Work) (____) _____

Cell Phone: (____) _____ Cell Phone: (____) _____

Email address (for private communications) _____**Occupation:** Taxpayer _____ Spouse _____**Check One:** ☐ Single ☐ Married Filing Joint ☐ Surviving Widow/Widower ☐ Divorced in 2024
☐ Married Filing Separately (enter spouse's name/SS No. Above) ☐ Unmarried/Head of Household**Did you get married in 2024?** _____ **Are you a domestic partner registered in California?** _____

Dependents Name	Birth date/ Age	Social Security Number*	Relationship	Live with you in 2024?	Health insurance coverage?	Tuition Cost Attending College (including books)

*A personal exemption is disallowed for any dependent that does not provide a Social Security number.

HEALTH CARE: Were you covered by a health insurance policy in 2024 (Required for California)?

☐ No ☐ Yes, through work or school ☐ Yes, through a union retirement plan ☐ Yes, through another person
☐ Over 65, Medicare ☐ Yes, State exchange/Covered California/Medical ☐ Federal exchange ☐ Other _____

If you are **self-employed**, how much were your premiums each month? Amount: \$ _____**FOREIGN ACCOUNTS, BITCOIN, CRYPTOCURRENCIES:****Are you a US Citizen or resident alien and your name is on a foreign bank account, brokerage account, or you are involved in a foreign trust account?** ☐ Yes ☐ No**If yes, did the account have more than \$10,000 (USD) in it at any one time throughout 2024?** ☐ Yes ☐ No**Did you receive gifts or inheritance in excess of \$13,600 from a foreign person?** ☐ Yes ☐ No**Did you buy, receive, sell, exchange, or otherwise dispose of cryptocurrencies or Bitcoin in 2024?** ☐ Yes ☐ No**Estimated Tax Payments Made:**

	1 st Quarter		2 nd Quarter		3 rd Quarter		4 th Quarter		TOTAL
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	
Federal									
State									
City									

To help you prepare for your coming appointment, we have created the below checklist as a guide for what you should bring with you. If you believe you have any documents that could affect your taxes for 2024, and they are not listed here, please feel free to bring them as well or call our office during normal business hours.

- ☐ 1099 Forms for all IRA & Pension Distributions you received during 2024, as well as the amount of contributions you made.
- ☐ If you made any state or federal Estimated Tax Payments during 2024, please provide all amounts paid as well as when they were paid.
- ☐ All Interest Income and Dividend Income earned in 2024 (Forms 1099-Int and 1099-Div)
- ☐ All 1099-SSA forms detailing all Social Security Benefits you received in 2024.
- ☐ Any 1099-G forms you received detailing Unemployment Benefits or State refunds you received.
- ☐ If you are divorced and are either paying or receiving alimony, please provide the amount you received/paid in 2024.
- ☐ Brokerage statements detailing stocks, bonds, and other assets sold during 2024.
- ☐ If you sold any of your real estate holdings (home, rental, etc.) please bring a copy of your Closing Escrow Statement.
- ☐ If you own properties that you rent out, please bring a summary of income and expenses for each property.
- ☐ If you have an interest in an Estate, Trust, Partnership, or S-Corporation, please bring a copy of your schedule K-1.
- ☐ If you are self-employed, please bring a summary of all income and expenses for your business as well as any other information (EIN, Home Office information, Business address, etc.)
- ☐ If you bought supplies for work (books, markers, pencils, etc.) and were not reimbursed or had other job related expenses (continuing education, dues, subscriptions to journals, etc.), please provide a list with prices.
- ☐ If you used your personal vehicle for work, please provide the total miles you traveled during the year, the total number of business miles traveled, and all auto expenses (repair, insurance, lease payments, etc.).
- ☐ A list of all Medical Expenses you paid in 2024 and were not reimbursed for (X-rays, Dentists, Prescriptions, Insurance premiums, etc.)
- ☐ If you have an outstanding mortgage, please bring a copy of your 1098 Mortgage Statement.
- ☐ A copy of all property taxes paid in 2024.
- ☐ If you made any donations by cash, or donation (Goodwill, Salvation Army, etc.) please provide a summary and include any letters or receipts you received.
- ☐ If you made any improvements on your residence personally, or paid for a contractor, please let us know what work was done and all costs.
- ☐ If you paid for tuition please bring the 1098-T from the school (usually found online).
- ☐ If you experienced a loss of property (house, vehicle, etc.) in a presidential declared disaster, such as the Eaton Canyon or Pacific Palisades fires, please provide the following information:
 - Item
 - Cost or other basis
 - Amount of Insurance or other reimbursement received
 - Fair Market Value before loss
 - Fair Market Value after loss