

2024 Individual Taxpayer Organizer

Taxpayer #1 identification PIN from IRS:

Taxpayer #2 identification PIN from IRS:

Please provide identification PINs for any dependents:

If you moved during 2024, enter your previous address:

Address 1:	
City:	
State:	
Date you moved:	

Marital status on 12/31/24:

Single	
Married	
Separated	
Surviving Spouse	

Questions

	Yes	No
"You" refers to both taxpayer and spouse when the spouse is not specifically mentioned		
Were any children of yours born in 2024?		
Were you a citizen of or did you live in a foreign country?		
Are you a member of the military?		
Are either you or your spouse legally blind?		
Did you purchase health insurance through a public exchange/marketplace? (Provide Form 1095-A.)		
Were you enrolled in a high deductible health insurance plan at any point during 2024?		
Did you use a health savings account (HSA) to pay for medical expenses in 2024?		
Have you received any notices from the IRS or state revenue department within the past year? If yes, please provide a copy.		
Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?		
Did you pay or receive alimony in 2024?		
Did you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home?		

Did you purchase an energy-efficient, hybrid, or electric vehicle?	☐	☐
Would you like to allow your tax preparer to discuss your return with the IRS?	☐	☐
Did you contribute any money to an IRA for 2024?	☐	☐
Did you roll over any amounts from one retirement account to another in 2024?	☐	☐
Did you sell or transfer any stock?	☐	☐
Did you sell or transfer rental or investment property? If yes, provide details.	☐	☐
Did you receive any income from an installment sale?	☐	☐
Did you have any investments become worthless or were you a victim of investment theft in 2024?	☐	☐
Did you purchase or sell a main home during the year? If yes, provide closing statement.	☐	☐
If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.	☐	☐
Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?	☐	☐
Did you work from a home office or use your car for your business?	☐	☐
Do you own an interest in a partnership, corporation, LLC, farming activities, or other venture?	☐	☐
Did you pay any estimated taxes for 2024? If yes, complete the "Estimated Tax Payments Paid in 2024" worksheet found on my website.	☐	☐
Did you pay sales taxes on a major purchase in 2024, such as a vehicle, boat, or home?	☐	☐
Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.	☐	☐
Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?	☐	☐
Did you make any charitable contributions in 2024? If yes, complete the "Schedule A 2024" worksheet found on my website.	☐	☐
Did you pay for child or dependent care so you could work or go to school? (Provide statement from care provider if applicable)	☐	☐
Did you make any new energy-efficient improvements to your home? If yes, provide details.	☐	☐
Did you make any contributions to a 529 plan in 2024? If yes, provide details.	☐	☐
Did you withdraw money from a 529 plan in 2024? If yes, provide details.	☐	☐
Did you pay any tuition for a private school for a dependent? (Provide statement from school if applicable)	☐	☐

Income

Yes No

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 have received

Let your preparer know if you received the following types of other income:

State tax refund - provide Form 1099-G

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Unemployment compensation - provide Form 1099-G

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Unreported tips

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Business (Sch C and/or sole proprietor) income - if yes, complete the "Schedule C 2024" worksheet found on my website.

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Rental income - if yes, complete the "Schedule E 2024" worksheet found on my website.

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Stock sales not listed on Form 1099-B

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Social security - provide Forms SSA-1099 or RRB-1099

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Gambling income - if yes, provide any and all Forms W-2G and also complete the "Gambling Income 2024" worksheet found on my website.

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Any other forms of income not mentioned above or elsewhere on this organizer

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Deductions

Yes No

Let your preparer know if you might have paid, contributed, or incurred the following:

Educator expenses. Classroom expenses of teachers, counselors, and principals. \$300 max.

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Health savings account (HSA) contributions OTHER THAN pre-tax contributions on your W-2

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Self-employed SEP, SIMPLE, and qualified plans

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Self-employed health insurance

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Penalty on early withdrawal of savings

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IRA deduction for traditional IRA contributions

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Student loan interest

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Moving expenses ONLY FOR members of the Armed Forces with special situations

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Other deductions not mentioned above or elsewhere on this organizer

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