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2024 1040 Tax Organizer - Client information

Personal Data *(Please Print)*

	First Name, M.I., Last Name	SSN	Date of Birth	Sex	Occupation
Taxpayer:		- -	/ /	□ M □ F	
Spouse:		- -	/ /	□ M □ F	

Primary Residence Address:		Primary contact:
City, State, Zip:		Text □
Secondary Residence:		□ TP □ SP E-mail □
City, State, Zip:		Phone □
Taxpayer E-mail:	Taxpayer Phone:	( ) -
Spouse E-mail:	Spouse Phone:	( ) -

Check if you are a Victim of Identity Theft □ TP □ SP IRS PIN # TP [ ] SP [ ]

Tax Year Filing Status *(Check One)*

Single:	□	if MFS : Spouse's Name :	
Head of Household:	□	Spouse's SSN:	- -
Qualifying Widow(er):	□	Check if you live with your spouse at all during the taxable year.	□
Married Filing Joint:	□	If yes, check if lived with your Spouse anytime after June 30th.	□
Married Filing Separate:	□	Did your Spouse file a tax return & Itemize Deductions ?	□ Y □ N

Dependents *(if applicable)* *.... Head of Household must complete this section.*

First Name	Last Name	SSN	Date of Birth	Relationship & Months in Home	Full-Time Student?	Dependent's Gross Income
		- -	/ /	-	□ Y □ N	$
		- -	/ /	-	□ Y □ N	$
		- -	/ /	-	□ Y □ N	$
		- -	/ /	-	□ Y □ N	$
		- -	/ /	-	□ Y □ N	$

Are any of your dependents shared with other taxpayers or shared in alternating years? □ Y □ N
We can file your dependent's tax return to coordinate both returns.

Divorce *(if applicable)*

Date divorce/seperation agreement was final: / /

Check if the original divorce decree or seperation agreement was modified any time after the taxable year end. □

State Residency Information for Taxable Year (*required*)

State	Own, Rent, Other	Date Moved In	Date Moved Out	County on Jan 1	School District
		/ /	/ /		
		/ /	/ /		
		/ /	/ /		

State Renter's Deduction (*if applicable*)

Address Rented, if different:			
Total Months Rented	#	Landlord's Name:	
Your Portion of Monthly Rent	$	Landlord's Address	
Your Portion of Annual Rent	$	Did you rent more than one address to reach $3,000 paid? ◻ Y ◻ N	

CollegeChoice 529 Credit 837 (*if applicable*)

Beneficiary Name	Account #	Contribuitions paid for Higher Eduction	Contributions paid for K - 12 Education	Provide Tax Documents

K - 12 Private School / Homeschool Education Deduction (*if applicable*)

Name of Student	Gr	Qualifying Expenses	Name of School	City, State, Zip

College Charitable Contribution Credit (*if applicable*)

Name of Indiana College or University	4 Digit Code	Amount	Date
		$	/ /
		$	/ /
		$	/ /

I Would Like to Discuss the Tax Impacts Regarding …. (*optional*)

- ☐ My W-2, Payroll Deductions & Form W-4
- ☐ HSA Health Savings Accounts
- ☐ 401K Contributions
- ☐ Retirement Contribution Deductions
- ☐ College 529 Savings Plans
- ☐ Tuition / Education Deductions & Credits
- ☐ Charitable Contributions Deduction
- ☐ Changes in Family Size
- ☐ Inherited Assets
- ☐ Divorce
- ☐ Retirement & Social Security Income
- ☐ Gains from the Sale of a Main Home
- ☐ Prior Year Tax Returns
- ☐ IRS or State Agency notices
- ☐ Estimated Tax Payments
- ☐ Subcontract Labor Form W-9 & Form 1099-MISC
- ☐ Personal Property Taxes
- ☐ Purchasing a Vehicle & Deducting a Vehicle
- ☐ Assets and Depreciation
- ☐ Selling Assets / Investments & Capital Gains
- ☐ In Home Office Deductions
- ☐ Buying / Selling a Rental Property
- ☐ Starting / Closing a Small Business
- ☐ Forming a LLC
- ☐ QBID Qualified Business Income Deduction
- ☐ Marginal Tax Rate vs Average Tax Rate
- ☐ State Tax Rates
- Other :

Electronic Filing *(required)*

All Tax Returns are Required to be E-Filed. This is a free service.

Electronic Approval and Electronic Signatures *(required)*

All Clients will receive an Online E-Signature request via DocuSign once their return is ready for final approval and filing. The E-Signature request contains an online copy of your returns.

Online Client Document Portal (LINK, cloud hosted by Intuit) (*optional, but recommended*)

This Service is OPTIONAL, if you would like to use the Client Document Portal please call us and we will invite you.
All Clients have a FREE two-way client document portal available. This entire packet is available in your document portal.
Clients can use their secure Client Document Portal Link to send, store and print their tax documents and tax returns.
LINK allows us to share documents back and forth using PDF scans, JPG pictures, and other upload methods.

Paper Copies (*optional*)

All Clients will receive an Online Copy of their tax returns with their completed E-Signature via DocuSign.
LINK Document Portal Clients will also have a copy of their returns stored in their document cloud hosted by Intuit.
Any Original Tax Documents received will be returned via USPS for an additional $10 fee.
Paper Copies of Tax Returns can be provided for an additional $10 fee.

Client Options *(required)*

		Initial
Please Return my Original Tax Documents, I did not provide copies.	$ 10 fee	[ ]
Please send me a paper copy of my Tax Returns via USPS.	$ 10 fee	[ ]

Payment Choice : (*Select one*) fees are compiled and presented with returns for review.

- ☐ Cash or check — a free service
- ☐ Zelle to 317-413-8338 — a free service
- ☐ ACH bank transfer — a free service
- ☐ Credit or Debit Card — 3 % fee

Cardholder Name:			
Card Number:	- - -	Security Code:	
Expiration Date:	/	Billing Zip:	

2024 Tax Fees

All Tax Returns must be approved, signed, and fees paid before e-file can proceed. Tax fees are now $180 per hour. Any situations identified that could materially increase your fees will be communicated to you promptly before work begins. I appreciate your loyalty and your referrals. Thank you again.

Final Checklist

Items to be returned to CPA for tax prep

- ☐ Signed Engagement Letter
- ☐ Completed Client Information 4 pages, Signed at page 4
- ☐ Completed Tax Organizer 50 pages
- ☐ Copies of Last Pay Stubs for the Year
- ☐ Copies of all W-2s
- ☐ Copies of all 1099-Gs (Government Payments)
- ☐ Copies of all 1095-Cs or 1095-Bs (Health Insurance)
- ☐ Copies of all 1095-As (Health Insurance Marketplace)
- ☐ Copies of 1099-INTs (Interest Income)
- ☐ Copies of all 1099-DIVs (Dividend Income)
- ☐ Copies of all 1099-Bs (Sales of Stocks & Bonds)
- ☐ Copies of all Brokerage Statements
- ☐ Copies of all 1099-SSAs (Social Security Income)
- ☐ Copies of all 1099-Rs (Retirement Income)
- ☐ Copies of all K-1s (Partnership, S-Corp, Trust)
- ☐ Copies of all 1098s (Mortgage Interest Paid)
- ☐ Copies of all Real Estate Closing Documents
- ☐ Copies of all 1098-Ts (Tuition Paid)
- ☐ Copies of all Receipts for Sales Tax Paid on Big Purchases (Vehicles, Boats,…)
- ☐ Copies of Divorce Decree / Separation Agreement (if new)
- ☐ Copies of Prior Year Tax Returns (new clients only)
- ☐ Copies of any other Tax Documents You Received
- ☐ Copies of any IRS or State Tax Notices You May Have Received
- ☐ Copy of a Check or a screen shot for Direct Deposit information
- ☐ Do Not Send Your Receipts, only the Tax Documents Listed Above.

Signatures for Return Processing

(required)

I certify that the information provided in this organizer is accurate and complete. I understand it is my responsibility to include any and all information concerning income, deductions and other information necessary for the preparation of my personal income tax returns. All returns received and still in our office on March 15 will have automatic extensions filed.

(If filing a joint return both parties must sign and date.)

Taxpayer Signature:		Date:	/ /
Spouse Signature:		Date:	/ /