



This drop off organizer is a guide to help us be able to prepare your taxes

Personal Information

Name		Soc Sec #	Date of Birth	Occupation
Taxpayer				
Spouse				
Address	City	State	Zip	
Email	Phone	Phone		

Dependents

Name	Social Security Number	Son or Daughter	Months in home	Date of birth	Disabled?	Student?

Please provide for drop off

- Last years tax return (new clients only)
- All tax statements (W2s, 1099s, 1098s, etc)

Please answer following questions to help with return

Mark one		Mark one	
Are you self-employed or do you receive any hobby income? If yes fill out small business organizer also.	Yes	Did you sell or receive any digital currency in 2024? If yes provide information for that.	Yes
	No		No
Did you receive rent from real estate or other property? If yes fill out rental organizer also.	Yes	Did you withdraw any money from retirement accounts or sell any stock? If yes provide information on that.	Yes
	No		No
Did you earn income in a foreign bank account, savings account, trust, or business?	Yes	Did you have any debts cancelled, forgiven or refinanced your home? If yes please provide information.	Yes
	No		No
Did you do anything energy efficient to your home? If yes provide what you did and the cost.	Yes	Did you pay interest on a student loan for yourself, spouse, or a dependent during the year? If yes provide the amount of interest paid in 2024.	Yes
	No		No
Were you or a dependent attend college last year? (If yes provide 1098-T)	Yes	Did you pay tuition to a private school for a dependent grades K-12? If yes please provide tuition statements or amount paid towards tuition in 2024.	Yes
	No		No

If you are a licensed teacher that provided classroom supplies? If yes how much did you spend?	Yes	Did you purchase school supplies, dance tuition, music lessons or an instrument for a dependent grades K-12? If so provide documentation or amounts and what it was for.	Yes
	No		No

Did you buy a new alternative technology vehicle or electric vehicle?	Yes	Were you insured through MN Sure anytime during the year? If yes please provide 1095-A.	Yes
	No		No

Did you contribute to an HSA or a traditional IRA outside of work during the year? If so provide amounts and what it was for.	Yes	Do you have long term care insurance? If so provide account number and amount paid.	Yes
	No		No
			Amount

Did you make any estimated tax payments? If so provide amounts for each quarter and to who.	Yes	How much in charitable contributions did you make to salvation army or qualified non profit this includes church?	
	No		
	Amount		Amount

Did you pay any mortgage interest? If so bring in documentation or let us know amount		Did you pay any property taxes? If so bring in documentation or let us know amount	
	Amount		Amount

Did you pay for any car tabs during the year? If so bring in documentation or let us know amount.		Do you contribute to a 529 plan for anyone? If yes please provide name of person account number and amount put into 529 plan for 2024.	
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Please include any questions you would like answered here or on a separate piece of paper.

If you would like direct deposit please have you routing and account number or provide below

Routing	Account	Bank name

Please Sign below

To the best of my knowledge the information enclosed in this client organizer is correct and includes all income, deductions, and other information necessary for the preparation of my income tax returns for which I have records of.

Taxpayer Date

Spouse Date