



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

	Circle one			Circle 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		

