



**Tina-303-562-1287/720-709-5337 or Matt-720-709-5336**

## RETURNING CLIENT-INDIVIDUAL TAX ORGANIZER-2024

Please complete pages 1 through 4 and all applicable sections.

Taxpayer's name \_\_\_\_\_ Last Four-Digits of SSN \_\_\_\_\_

Spouse's name \_\_\_\_\_ Last Four-Digits of SSN \_\_\_\_\_

**\*New Only**

Home address \_\_\_\_\_

Number                  Street                  City, town or post office                  State                  ZIP-Code

**\*New Telephone number (Taxpayer)**

Home \_\_\_\_\_

Cell \_\_\_\_\_

Email Address \_\_\_\_\_

Blind? Yes No

**\*New Telephone number (Spouse)**

Home \_\_\_\_\_

Cell \_\_\_\_\_

Email Address \_\_\_\_\_

Blind? Yes No

### Copies of the Driver's licenses will be required for Taxpayer and Spouse.

**\*Dependent Children Who Lived With You for 6months out of the year:**

Full Name	Social Security Number	Date of Birth	Relationship	Dependent Care	CC-Y/N

**Child Care:**

Name	Address (Street, City, Zip-Code)	Tax-ID(SSN/EIN)*	Amount Paid	DCB

**\*Statement with Tax ID required for Dependent Care Deduction.**

**Insurance purchased through Market Place (Connect for Health) Yes \_\_\_\_\_ \***

**\*Form 1095A Required to file Tax Return**



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**Estimated Tax Payments Made (NOT Included on Other Income Statements(W2's, 1099's))**

Quarter Due Dates	Date Paid	Federal Amount Paid	State Amount Paid
1 <sup>st</sup> -04/15/2024			
2 <sup>nd</sup> -06/15/2024			
3 <sup>rd</sup> -09/15/2024			
4 <sup>th</sup> -01/15/2025			

**Income**

**-Income-W2**

**Please provide all W-2s and include the number of W-2s provided for Tax Year 2024**

Number of W-2s Provided \_\_\_\_\_ (Taxpayer)

Number of W-2s Provided \_\_\_\_\_ (Spouse)

**-Income-1099 MISC/1099-NEC (Self-Employment Income)**

**Please provide all 1099s and include the number of 1099s provided for Tax Year 2024**

Number of 1099-NEC/MISC Provided \_\_\_\_\_ \*(Taxpayer)

Number of 1099-NEC/MISC Provided \_\_\_\_\_ \*(Spouse)

**\*Please use page 5 for Business income and Expenses and page 6 for Rental Income and Expenses**

**-Social Security Income-Form SSA-1099**

**Please provide all SSA-1099 Forms and include the number of SSA-1099s provided for Tax Year 2024**

Form SSA-1099, SS Statement \_\_\_\_\_ (Taxpayer)

Form SSA-1099, SS Statement \_\_\_\_\_ (Spouse)

**-Pensions & IRA's-1099R**

**Please provide all 1099-R Forms, Distributions from Pensions, Annuities, Retirement, IRAs, etc.**

**Please provide all company forms that distributed 1099-Rs for Tax Year 2024.**

Form 1099-R \_\_\_\_\_ (Taxpayer)

Form 1099-R \_\_\_\_\_ (Spouse)

**-Unemployment-Form 1099-G Certain Government Payments (This is Taxable Income)**

**Please provide all 1099-Gs for Tax Year 2024**

Form 1099-G \_\_\_\_\_ (Taxpayer)

Form 1099-G \_\_\_\_\_ (Spouse)



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### Income

#### - Gambling Income-Form W-2G

Please provide all W-2Gs and include the number of W-2Gs provided for Tax Year 2024

Form W2-G \_\_\_\_\_ (Taxpayer)

Form W2-G \_\_\_\_\_ (Spouse)

#### -Contribution(s) to REG IRA or ROTH IRA Outside of W2(NOT SEP IRA)

Taxpayer REG IRA \_\_\_\_\_ ROTH IRA \_\_\_\_\_

Spouse REG IRA \_\_\_\_\_ Roth IRA \_\_\_\_\_

### Investment Income

#### -Interest Income-1099 INT

Please provide all 1099-Interest Statements and include the number of statements received for Tax Year 2024

Number of 1099-Int Provided \_\_\_\_\_

Name of Payer	Amount	Name of Payer	Amount

#### -Dividend Income-End of Year Statements

Please provide ALL pages (Front and Back) of Form 1099-B, Proceeds from Broker and Barter Exchange Transactions. (Please provide below all companies that distributed 1099-Bs for Tax Year 2024.)

#### -Stock Sold End of Year Statements

Please provide ALL pages (Front and Back) of Form 1099-B, Proceeds from Broker and Barter Exchange Transactions. (Please provide below all companies that distributed 1099-Bs for Tax Year 2024.)

#### -Property Sold Primary Residence or Second Home only(Settlement Statement for the sale of the property required along with Original Purchase Price(Cost Basis))

Address/Description	Date Sold	Date Purchased	Selling Price	Cost Basis	Primary/Second Home

See Page 6 for Rental Home Sale



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### Itemized Deductions

#### Medical Expenses

<b>Paid to Whom</b>	<b>Amount</b>	<b>Mileage-.21 cents</b>
Medical Insurance (supplemental only)		
Annual out of pocket Prescription cost		
Doctors / Dentist out of pocket cost		
Hospitals / Clinics out of pocket cost		
Eye Expenses out of pocket cost		
Hearing Aids and medical equipment out of pocket cost		
Therapy, Homecare, etc. out of pocket cost		
<b>Long Term Care Insurance Paid-Taxpayer</b>		
<b>Long Term Care Insurance Paid-Spouse</b>		
Other		
		<b>Total Mileage-</b>
<b>1099 SA for HSA Contribution (Employer or Self) Form Required</b>	-	

<b>Mortgage Interest-Form 1098(Not Rental See Page 6)</b>	<b>Amount</b>	<b>Educational Expenses</b>	<b>Amount</b>
Home Mortgage (Primary)		Student Loan Interest-Taxpayer	
Home Mortgage (Primary)		(Provide Forms)	
Home Mortgage (Second home)		Student Loan Interest-Spouse	
		(Provide Forms)	
<b>Real Estate Taxes Paid (Primary)</b>		<b>College Costs</b>	
Second Home		Please Provide <b>1098-T</b> Form College	
<b>Vehicle Registration Amount Paid</b>		<b>College Invest used for Expense</b>	
<b>(Ownership Tax only not total paid)</b>		Please Provide <b>1099Q</b> is used	

#### Contributions/Donations(If needed provide list)

<b>Paid Cash or Check-Name of Organization</b>	<b>Amount</b>	<b>Goods Given (Goodwill, Arc, etc.)</b>	<b>Thrift Amount</b>
<b>Charitable Mileage (.14)</b>			

**Energy Credit Solar, Electric Vehicle Credit(NEW) and Energy Credits(Windows, HVAC & Insulation)-Please provide documents for these credits.(Invoice, Purchasing agreement, etc)**



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## Self-Employed Business and 1099 Income and Expenses

Name of Company(if applicable)-	
	EIN-
Income(Total for the year)	
Expenses(Total for the year in each category)	
Advertising	
Contract Labor Paid	
Insurance (Liability)	
Legal and Professional Services	
Office Supplies	
Rent	
Tools	
Equipment	
Meals with clients only	
Bank Service Fees	
Internet	
Cell phone	
SEP IRA CONTRIBUTION	

Business Mileage Total for the year \_\_\_\_\_ (67 cents per mile 2024)

Please provide Mileage Log form from Mile IQ-Otherwise it is your responsibility if you get audited to provide this to the IRS. They require the log to include starting mileage (1/1) and ending mileage (12/31) year to year along with day-to-day business mileage.



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## Rental Property Information

**If you are contracted with a Property Management Company, please provide end of year statement for each property from the company you use. Any expense you paid outside of the management company please provide below.**

**(Only fill out if you manage your own rental property or paid outside of management company)**

<b>Rental Income(Total for the year collected before expenses(Gross))</b>	
<b>Expenses-Total for the year(Most common, write in any missing category)</b>	
Advertising	
Auto and Travel                      Mileage-	
Cleaning and Maintenance	
Insurance	
Legal and other Professional Fees	
Management Fees	
Mortgage Interest	
Repairs	
Supplies	
Real Estate Taxes	
Utilities	
HOA	
Bank Service Fees	

## Rental Property Sold (Settlement Statement for the sale of the property required)

Address/Description	Date Sold	Selling Price

**If you did a 1031 exchange of a rental property, there is additional paperwork required and additional fee.**