

1040 Individual Tax Organizer– EN

Personal Information:

1. SSN (Taxpayer & Spouse)
2. Driver's License (Taxpayer & Spouse)
3. Current Address (If Different from Driver's License)
4. Last year's tax return (If applied)

Non-resident (If Applied):

1. VISA and Foreign Address
2. How many years have you stayed in the US?

Dependents Information:

1. Name and SSN
2. Date of Birth
3. Relationship
4. Are you the only person claiming them as a dependent?
5. Do they live with you?
6. Do you financially support them?

Bank Information (Option for Direct Deposit/ Refund)

1. Routing number
2. Account number

Income from Job:

1. W-2s

Investment & Other 1099 Income:

1. 1099s - 1099 (-INT, -DIV, -B, etc.)
2. 1099-G
3. 1099-R

Business Income:

1. K-1s

Sole Proprietorship Business Income Without K-1:

1. General Info (Business name, EIN/SSN, Business scope)
2. Profit/loss statement
3. Capital equipment information (Depreciation Asset)
4. 1099-Ks if applied

Rental Income: (Please fill out our form)

1. Rental Property Information
2. Profit/loss statement

Other miscellaneous income:

1. Taxable alimony received (applicable to divorces finalized before January 1, 2019)
2. Gambling winnings
3. Medical Savings Account (MSA)
4. Scholarships
5. Gift received more than \$17,000 in 2023
6. Foreign income (Wages, Salaries, Pension, etc.)
7. Other Income

Income Adjustments:

1. IRA contributions
2. 1098-E: Student loan interest
3. Health Savings Account (HSA) contributions
4. Self-employed health insurance premium payments
5. Keogh, SEP, SIMPLE, and other self-employed pension plans
6. Alimony paid that is tax deductible (applicable to divorces finalized before January 1, 2019)

Itemized Tax Deductions:

1. Form 1098 - Mortgage interest
2. Escrow closing statement from mortgage refinancing
3. Charitable donations: cash amounts, official charity receipts, value of donated property
4. Medical and dental bills (Including Medical, Medicare, and long-term care insurance premiums, and medical supplies and travel costs)
5. Casualty and theft losses: Amount of damage, Insurance reimbursements
6. State and local taxes you've paid: (Including property, sales and income tax, and vehicle license fees based on the value of your vehicle)

Tax Credit:

1. Childcare costs: Provider's name, Address, Tax ID, and Amount paid
2. Education costs: Form 1098-T, education expenses including books and school supplies
3. 1095-A: Health insurance information
4. Clean vehicle purchase information
5. Clean energy purchase information: Including solar electricity generation, solar water heaters, wind, turbines, heat pumps, battery storage, and fuel cells
6. Adoption costs: Including SSN of the child; records of legal, medical, and transportation costs

Other Information:

1. Estimated tax payments made during the year including date and amount
2. Prior-year refund applied to the current year and/or any amount paid with an extension of time to file.
3. Foreign bank account information: location, name of bank, account number, peak value of account during the year