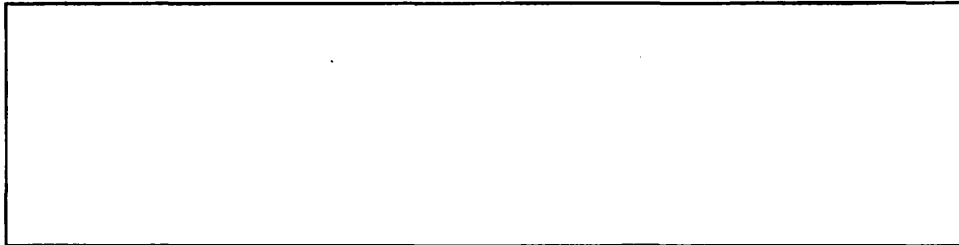
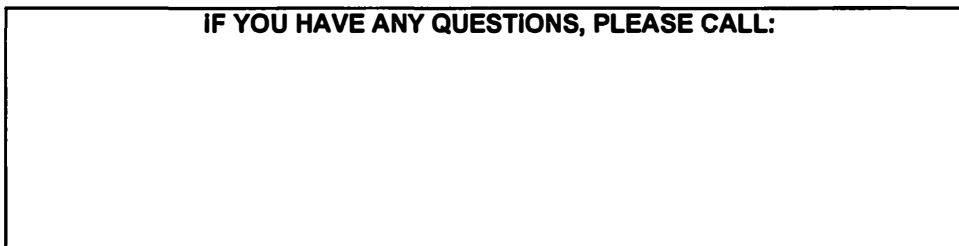


INCOME TAX ORGANIZER FOR TAX YEAR 2024

A large, empty rectangular box with a black border, intended for the user to provide tax information or attach documents.

We're providing this organizer to assist you in compiling your tax information for 2024. The enclosed pages include information from last year's tax return and spaces in which to write current year information and any questions or comments you have for us. We appreciate the opportunity to serve you.

IF YOU HAVE ANY QUESTIONS, PLEASE CALL:

A rectangular box with a black border, intended for the user to provide contact information or a phone number.

GENERAL INFORMATION**2024
(MAIN INFO)**

Taxpayer's First Name	M.I.	Spouse's First Name	Spouse's M.I.
Taxpayer's Last Name	Suffix	Spouse's Last Name (if different)	
Taxpayer's Social Security Number		Spouse's Social Security Number	
Present Home Address	City, State, Zip Code		
E-Mail Address			

Filing Status: Please Check One

☐ Single ☐ Married Filing Joint ☐ Married Filing Separately ☐ Head of Household ☐ Qualifying Widow(er)

If you selected head of household and have no dependents, list the name
and Social Security number _____ of your qualified child who lives with you and qualifies you for this status.

Dependents/Nondependents Qualifying for Child Care and/or EIC

Note: If any children listed below are nondependents then mark an 'X' in the column listed "Non Dep."

First Name	Last Name	Date of Birth	Social Security Number	Relationship	Months in home	Non Dep.

If you are claiming as a dependent a child who did not live with you, check the documents that substantiate this claim:

☐ Pre-1985 divorce or separation agreement ☐ Signed Form 8332
☐ Post-1984 divorce or separation agreement WITHOUT CONDITIONS

Taxpayer's Birth Date	Spouse's Birth Date
Taxpayer's Occupation	Spouse's Occupation
Daytime Phone	Daytime Phone
Evening Phone	Evening Phone
Cell/FAX Phone	Cell/FAX Phone

State of Residency:(2-Letter Abbreviation) State of Part-year Residency 2nd State of Part-year Residency

Please use the following space for any comments you wish to make to your preparer.

AT ANY TIME DURING 2024:

[illegible][illegible]

YES	NO

ORG\$\$\$\$2

2024 TAX QUESTIONS

AT ANY TIME DURING 2024:

Did you or your spouse

YES	NO

- Have a home mortgage?
- Refinance your home mortgage?
- Use a portion of your home exclusively for business?
- Have medical expenses or pay for health insurance?
- Make regular or substantial contributions to charity, church, etc.?
- If yes, did you make over \$500.00 in non-cash contributions?
- Suffer a casualty loss in a federally declared disaster area?
- Incur any out of pocket expense or use your personal vehicle in conjunction with your job while you were a member of the Armed Forces?
- Move to be closer to a new job?
- Send payments to the IRS/state in order to prepay your current year tax liability (estimated taxes) or apply an overpayment from 2023?
- Have any interest in a partnership or S-corporation estate or trust for which you expect to receive Form K-1?
- Have any household employees to whom you paid \$1000.00 or more?
- Have a qualified fuel tax credit?
- Contribute to an: ☐ IRA? ☐ SEP? ☐ Keogh? ☐ Roth? ☐ or Simple retirement plan?
- Get claimed (or were eligible to be claimed) as a dependent on anyone else's return?

YES	NO

- Did you or your spouse receive, sell, exchange, or otherwise acquire any financial interest in any virtual currency (for example, Bitcoin)?
- Did you, your spouse, or any dependent receive insurance through the Marketplace?
- Did your children receive more than \$1,150 and less than \$11,500 from interest and dividends that you wish to claim on your own tax return instead of your child's?
- Did you pay child or dependent care expenses? If so, please bring names, addresses, Social Security/EIN numbers, amount paid to each provider, and amount paid for each dependent.
- Did you pay qualified post-secondary education tuition and related expenses for yourself, your spouse, or your dependents?
- Did you cash any US EE or I bonds to pay for post-secondary education for yourself, your spouse, or your dependents?
- Did you pay interest on higher education loans?
- Were you a pre-college educator who purchased books or classroom supplies?
- Did you purchase a car, boat, aircraft, motor home or home building materials in 2024 or keep receipts on all sales tax items purchased in 2024?
- Were there any births, adoptions, divorces, marriages, or deaths in your household?
- Do you desire direct deposit? If yes, please attach voided check.

W-2 INCOME

2024
(W-2)

Listed below are your employers shown on your last year's income tax return.

Name of employer

Street address

City, State, Zip Code

Employer Identification Number

☐ TAXPAYER

☐ SPOUSE

Name of employer

Street address

City, State, Zip Code

Employer Identification Number

☐ TAXPAYER

☐ SPOUSE

Name of employer

Street address

City, State, Zip Code

Employer Identification Number

☐ TAXPAYER

☐ SPOUSE

Name of employer

Street address

City, State, Zip Code

Employer Identification Number

☐ TAXPAYER

☐ SPOUSE

Name of employer

Street address

City, State, Zip Code

Employer Identification Number

☐ TAXPAYER

☐ SPOUSE

Name of employer

Street address

City, State, Zip Code

Employer Identification Number

☐ TAXPAYER

☐ SPOUSE

Name of employer

Street address

City, State, Zip Code

Employer Identification Number

☐ TAXPAYER

☐ SPOUSE

Name of employer

Street address

City, State, Zip Code

Employer Identification Number

☐ TAXPAYER

☐ SPOUSE

* Please include a W-2 from each of your 2024 employers.

PENSION AND RETIREMENT INCOME

2024
(1099R)

PENSIONS AND IRAS

Listed below are your pension, IRA distributions, and Social Security received last year (if any).

Name of payer
Street address
City, State, Zip Code
Employer Identification Number

☐ TAXPAYER ☐ SPOUSE ☐ IRA

Name of payer
Street address
City, State, Zip Code
Employer Identification Number

☐ TAXPAYER ☐ SPOUSE ☐ IRA

Name of payer
Street address
City, State, Zip Code
Employer Identification Number

☐ TAXPAYER ☐ SPOUSE ☐ IRA

Name of payer
Street address
City, State, Zip Code
Employer Identification Number

☐ TAXPAYER ☐ SPOUSE ☐ IRA

Name of payer
Street address
City, State, Zip Code
Employer Identification Number

☐ TAXPAYER ☐ SPOUSE ☐ IRA

Name of payer
Street address
City, State, Zip Code
Employer Identification Number

☐ TAXPAYER ☐ SPOUSE ☐ IRA

* Please include any 1099's and other 2023 information.

If you ever made non-deductible contributions to your IRA, please provide year-end balances of all your IRA accounts.

SOCIAL SECURITY BENEFITS

(1040 WKT)

2024 AMOUNTS

Taxpayer Amount \$ _____

Spouse Amount \$ _____

2023 TOTAL AMOUNT

CHILD AND DEPENDENT CARE EXPENSES

2024
(2441)

Please list all care providers and the amounts paid to them in 2024. Any information from the prior year is shown below.

Name of provider			
Street address			
City, State, Zip Code			
Social Security Number or EIN			
Amount paid	\$	2024 AMOUNT	\$

Name of provider			
Street address			
City, State, Zip Code			
Social Security Number or EIN			
Amount paid	\$	2024 AMOUNT	\$

Name of provider			
Street address			
City, State, Zip Code			
Social Security Number or EIN			
Amount paid	\$	2024 AMOUNT	\$

Name of provider			
Street address			
City, State, Zip Code			
Social Security Number or EIN			
Amount paid	\$	2024 AMOUNT	\$

Name of provider			
Street address			
City, State, Zip Code			
Social Security Number or EIN			
Amount paid	\$	2024 AMOUNT	\$

List name of each child and total amount spent for care of that child.

	\$
	\$
	\$
	\$

*You may change or delete any information that does not apply to the current year.

OTHER INCOME AND ADJUSTMENTS				2024
OTHER INCOME			2024	2023
Seller Financed Mortgages				
Payer	Principal	Interest		Interest
State and Local Income Tax Refunds Received in 2024				
State or Local jurisdiction		Amount received		
State or Local jurisdiction		Amount received		
State or Local jurisdiction		Amount received		
Unemployment (Please attach 1099G(s)).			2024	2023
Amount received:				
Amount repaid:				
Alimony amount received				
Other Income				
Type:			Amount:	
ADJUSTMENTS			Taxpayer 2024	Taxpayer 2023
Educator expense				
Self-employed retirement plans				
Self-employed health insurance paid				
IRA'S				
Traditional				
Roth				
Student loan interest				
Alimony Paid				
To whom paid:			Amount:	
SSN:				
Other Adjustments				
Type:			Amount:	

PARTNERSHIP AND S-CORPORATION INCOME

2024
(K-1 P/S)

Your 2024 K-1 information is

shown below. **K-1**

INFORMATION

Name of Partnership or S-Corporation

Federal ID Number

Enter "P" for partnership or "S" for S-Corp

K-1 INFORMATION

Name of Partnership or S-Corporation

Federal ID Number

Enter "P" for partnership or "S" for S-Corp

K-1 INFORMATION

Name of Partnership or S-Corporation

Federal ID Number

Enter "P" for partnership or "S" for S-Corp

K-1 INFORMATION

Name of Partnership or S-Corporation

Federal ID Number

Enter "P" for partnership or "S" for S-Corp

K-1 INFORMATION

Name of Partnership or S-Corporation

Federal ID Number

Enter "P" for partnership or "S" for S-Corp

K-1 INFORMATION

Name of Partnership or S-Corporation

Federal ID Number

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K-1 INFORMATION

Name of Partnership or S-Corporation

Federal ID Number

Enter "P" for partnership or "S" for S-Corp

K-1 INFORMATION

Name of Partnership or S-Corporation

Federal ID Number

Enter "P" for partnership or "S" for S-Corp

K-1 INFORMATION

Name of Partnership or S-Corporation

Federal ID Number

Enter "P" for partnership or "S" for S-Corp

* Please attach all K-1 schedules received for 2024.

2024
(SCH A)

*T,S,J 2024

* Taxpayer, Spouse, or Joint

Real estate taxes
Personal property taxes
Other _____

Home mortgage interest
Points paid in purchasing new home
Investment interest expense

Non-cash
Number of charity miles

2024
(SCH B)

ORGINTS1

BUSINESS INCOME AND EXPENSES

2024
(SCH C)

Your principal business or profession _____

Is this your spouse's Schedule C? _____

Business name _____

2023 Business code _____

Business address _____

Employer ID _____

(Not SSN)

Accounting method: _____

Enter date if you disposed of or sold this business during the year _____

BUSINESS VEHICLE

2024

2023

Date placed in service _____

Miles used for: Business _____

Commuting _____

Other _____

PART I INCOME

Gross receipts or sales _____

Returns and allowances _____

Other income _____

PART II EXPENSES

Advertising _____

Car/Truck expenses _____

Commissions _____

Contract labor _____

Depletion _____

Employee benefit programs _____

Insurance _____

Interest - mortgage _____

Interest - other _____

Legal and professional services _____

Office expense _____

Pension and profit sharing _____

Rent or lease - vehicles, machinery _____

Rent - Other business property _____

Repairs and maintenance _____

Supplies _____

Taxes and licenses _____

Travel _____

Meals and entertainment _____

Utilities _____

Wages _____

Enter prior year unallowed loss (if any) _____

OTHER EXPENSES

(SCH C PG 2)

Inventory method: ☐ Cost ☐ Lower of Cost or Market ☐ Other

Inventory at beginning of year _____

Purchases less cost of personal items _____

Inventory at end of the year _____

2024
(SCH D)

Description	Date Acquired	Date Sold	Sales Price	Cost
1967 Oldsmobile Delta 88	1967	1970	\$1,200	\$800
1968 Oldsmobile Delta 88	1968	1971	\$1,500	\$1,000
1969 Oldsmobile Delta 88	1969	1972	\$1,800	\$1,200
1970 Oldsmobile Delta 88	1970	1973	\$2,100	\$1,500
1971 Oldsmobile Delta 88	1971	1974	\$2,400	\$1,800
1972 Oldsmobile Delta 88	1972	1975	\$2,700	\$2,100
1973 Oldsmobile Delta 88	1973	1976	\$3,000	\$2,400
1974 Oldsmobile Delta 88	1974	1977	\$3,300	\$2,700
1975 Oldsmobile Delta 88	1975	1978	\$3,600	\$3,000
1976 Oldsmobile Delta 88	1976	1979	\$3,900	\$3,300
1977 Oldsmobile Delta 88	1977	1980	\$4,200	\$3,600
1978 Oldsmobile Delta 88	1978	1981	\$4,500	\$3,900
1979 Oldsmobile Delta 88	1979	1982	\$4,800	\$4,200
1980 Oldsmobile Delta 88	1980	1983	\$5,100	\$4,500
1981 Oldsmobile Delta 88	1981	1984	\$5,400	\$4,800
1982 Oldsmobile Delta 88	1982	1985	\$5,700	\$5,100
1983 Oldsmobile Delta 88	1983	1986	\$6,000	\$5,400
1984 Oldsmobile Delta 88	1984	1987	\$6,300	\$5,700
1985 Oldsmobile Delta 88	1985	1988	\$6,600	\$6,000
1986 Oldsmobile Delta 88	1986	1989	\$6,900	\$6,300
1987 Oldsmobile Delta 88	1987	1990	\$7,200	\$6,600
1988 Oldsmobile Delta 88	1988	1991	\$7,500	\$6,900
1989 Oldsmobile Delta 88	1989	1992	\$7,800	\$7,200
1990 Oldsmobile Delta 88	1990	1993	\$8,100	\$7,500
1991 Oldsmobile Delta 88	1991	1994	\$8,400	\$7,800
1992 Oldsmobile Delta 88	1992	1995	\$8,700	\$8,100
1993 Oldsmobile Delta 88	1993	1996	\$9,000	\$8,400
1994 Oldsmobile Delta 88	1994	1997	\$9,300	\$8,700
1995 Oldsmobile Delta 88	1995	1998	\$9,600	\$9,000
1996 Oldsmobile Delta 88	1996	1999	\$9,900	\$9,300
1997 Oldsmobile Delta 88	1997	2000	\$10,200	\$9,600
1998 Oldsmobile Delta 88	1998	2001	\$10,500	\$9,900
1999 Oldsmobile Delta 88	1999	2002	\$10,800	\$10,200
2000 Oldsmobile Delta 88	2000	2003	\$11,100	\$10,500
2001 Oldsmobile Delta 88	2001	2004	\$11,400	\$10,800
2002 Oldsmobile Delta 88	2002	2005	\$11,700	\$11,100
2003 Oldsmobile Delta 88	2003	2006	\$12,000	\$11,400
2004 Oldsmobile Delta 88	2004	2007	\$12,300	\$11,700
2005 Oldsmobile Delta 88	2005	2008	\$12,600	\$12,000
2006 Oldsmobile Delta 88	2006	2009	\$12,900	\$12,300
2007 Oldsmobile Delta 88	2007	2010	\$13,200	\$12,600
2008 Oldsmobile Delta 88	2008	2011	\$13,500	\$12,900
2009 Oldsmobile Delta 88	2009	2012	\$13,800	\$13,200
2010 Oldsmobile Delta 88	2010	2013	\$14,100	\$13,500
2011 Oldsmobile Delta 88	2011	2014	\$14,400	\$13,800
2012 Oldsmobile Delta 88	2012	2015	\$14,700	\$14,100
2013 Oldsmobile Delta 88	2013	2016	\$15,000	\$14,400
2014 Oldsmobile Delta 88	2014	2017	\$15,300	\$14,700
2015 Oldsmobile Delta 88	2015	2018	\$15,600	\$15,000
2016 Oldsmobile Delta 88	2016	2019	\$15,900	\$15,300
2017 Oldsmobile Delta 88	2017	2020	\$16,200	\$15,600
2018 Oldsmobile Delta 88	2018	2021	\$16,500	\$15,900
2019 Oldsmobile Delta 88	2019	2022	\$16,800	\$16,200
2020 Oldsmobile Delta 88	2020	2023	\$17,100	\$16,500
2021 Oldsmobile Delta 88	2021	2024	\$17,400	\$16,800
2022 Oldsmobile Delta 88	2022	2025	\$17,700	\$17,100
2023 Oldsmobile Delta 88	2023	2026	\$18,000	\$17,400
2024 Oldsmobile Delta 88	2024	2027	\$18,300	\$17,700
2025 Oldsmobile Delta 88	2025	2028	\$18,600	\$18,000
2026 Oldsmobile Delta 88	2026	2029	\$18,900	\$18,300
2027 Oldsmobile Delta 88				

[illegible]

Amount of long-term loss carryover from 2023

RENTAL REAL ESTATE AND ROYALTIES						2024 (SCH E)	
	Property A		Property B		Property C		
KIND OF PROPERTY							
LOCATION OF PROPERTY							
CITY							
STATE							
ZIP							
INCOME	2024	2023	2024	2023	2024	2023	
Rent received							
Royalties received							
EXPENSES							
Advertising							
Auto and travel							
Cleaning and maintenance							
Commissions							
Insurance							
Legal, professional fees							
Management fees							
Mortgage interest							
Other interest							
Repairs							
Supplies							
Taxes							
Utilities							
Miscellaneous Expenses							
Type of misc expense 1							
Amount item 1							
Type of misc expense 2							
Amount item 2							
Type of misc expense 3							
Amount item 3							
Type of misc expense 4							
Amount item 4							
Enter loss carryover to 2024							
Did you actively participate in this venture?							
Did you use this property for personal use?							

RENTAL REAL ESTATE AND ROYALTIES						2024 (SCH E-DUP)	
	Property A		Property B		Property C		
KIND OF PROPERTY							
LOCATION OF PROPERTY							
CITY							
STATE							
ZIP							
INCOME	2024	2023	2024	2023	2024	2023	
Rent received							
Royalties received							
EXPENSES							
Advertising							
Auto and travel							
Cleaning and maintenance							
Commissions							
Insurance							
Legal, professional fees							
Management fees							
Mortgage interest							
Other interest							
Repairs							
Supplies							
Taxes							
Utilities							
Miscellaneous Expenses							
Type of misc expense 1							
Amount item 1							
Type of misc expense 2							
Amount item 2							
Type of misc expense 3							
Amount item 3							
Type of misc expense 4							
Amount item 4							
Enter loss carryover to 2024							
Did you actively participate in this venture?							
Did you use this property for personal use?							