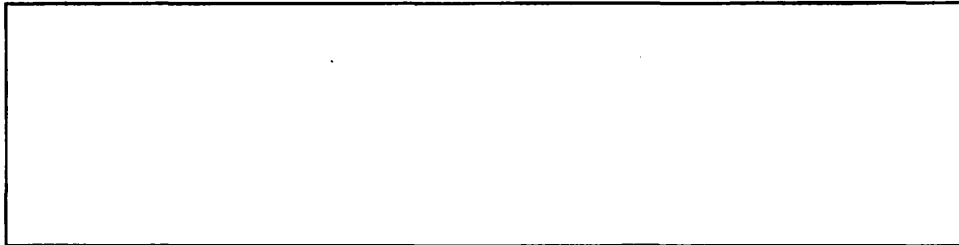
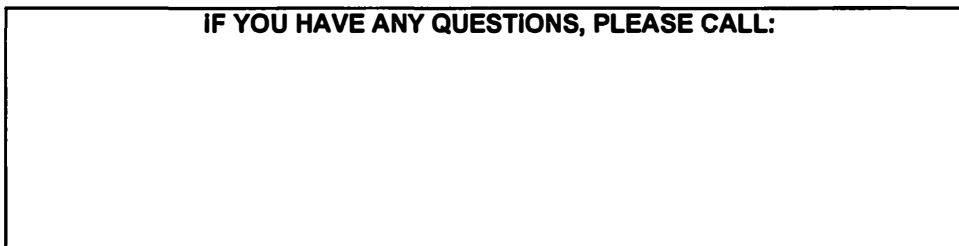


INCOME TAX ORGANIZER FOR TAX YEAR 2025

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

We're providing this organizer to assist you in compiling your tax information for 2025. 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 users to provide contact information or phone numbers.

2025

GENERAL INFORMATION**(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 2025:

[illegible]

Any miscellaneous income, such as prizes or jury duty pay?

[illegible]

Closing statements from real estate sales, purchases, or refinancing

YES	NO

If you sold any property above, are you receiving payments in installments?

2025 TAX QUESTIONS

AT ANY TIME DURING 2025:

Did you or your spouse

[illegible]

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 2024?

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?

[illegible]

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 2025 or keep receipts on all sales tax items purchased in 2025?

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

2025
(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

2025
(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)

2025 AMOUNTS

Taxpayer Amount \$ _____

Spouse Amount \$ _____

2024 TOTAL AMOUNT

CHILD AND DEPENDENT CARE EXPENSES

2025
(2441)

Please list all care providers and the amounts paid to them in 2025. Any information from the prior year is shown below.

Name of provider	<hr/>		
Street address	<hr/>		
City, State, Zip Code	<hr/>		
Social Security Number or EIN	<hr/>		
Amount paid	\$ <hr/>	2025 AMOUNT	\$ <hr/>

Name of provider	<hr/>		
Street address	<hr/>		
City, State, Zip Code	<hr/>		
Social Security Number or EIN	<hr/>		
Amount paid	\$ <hr/>	2025 AMOUNT	\$ <hr/>

Name of provider	<hr/>		
Street address	<hr/>		
City, State, Zip Code	<hr/>		
Social Security Number or EIN	<hr/>		
Amount paid	\$ <hr/>	2025 AMOUNT	\$ <hr/>

Name of provider	<hr/>		
Street address	<hr/>		
City, State, Zip Code	<hr/>		
Social Security Number or EIN	<hr/>		
Amount paid	\$ <hr/>	2025 AMOUNT	\$ <hr/>

Name of provider	<hr/>		
Street address	<hr/>		
City, State, Zip Code	<hr/>		
Social Security Number or EIN	<hr/>		
Amount paid	\$ <hr/>	2025 AMOUNT	\$ <hr/>

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

<hr/>	\$ <hr/>
<hr/>	\$ <hr/>
<hr/>	\$ <hr/>
<hr/>	\$ <hr/>

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

OTHER INCOME AND ADJUSTMENTS				2025
OTHER INCOME			2025	2024
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)).			2025	2024
Amount received:				
Amount repaid:				
Alimony amount received				
Other Income				
Type:			Amount:	
ADJUSTMENTS		Taxpayer 2025	Taxpayer 2024	Spouse 2025
				Spouse 2024
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

2025
(K-1 P/S)

Your 2025 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

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

* Please attach all K-1 schedules received for 2025.

2025
(SCH A)

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

2025
(SCH B)

ORGINTS1

2025
(SCH C)

Is this your spouse's Schedule C?

2023 Business code

Employer ID

(Not SSN)

Accounting method:

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

2024

Other

Other income

Enter prior year unallowed loss (if any)

(SCH C PG 2)

[illegible]

Inventory at end of the year

CAPITAL GAINS AND LOSSES

2025
(SCH D)

Stocks, Bonds, and Non-Business Assets

[illegible]

Amount of short-term loss carryover from 2024

Amount of long-term loss carryover from 2024

RENTAL REAL ESTATE AND ROYALTIES						2025 (SCH E)
	Property A		Property B		Property C	
KIND OF PROPERTY						
LOCATION OF PROPERTY						
CITY						
STATE						
ZIP						
INCOME	2025	2024	2025	2024	2025	2024
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						2025 (SCH E-DUP)	
	Property A		Property B		Property C		
KIND OF PROPERTY							
LOCATION OF PROPERTY							
CITY							
STATE							
ZIP							
INCOME	2025	2024	2025	2024	2025	2024	
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?							