JEREMY THORPE
CPA JD

105 N. Virginia Avenue
Suite 305
Falls Church, VA 22046
(571) 282-3535
www.ThorpeCPA.com

READ FIRST
BEFORE BEGINNING YOUR 2025 TAX PREP

One of my goals is to make it easier for you to get your taxes done. I want our tax organizer to be a tool to help you organize your information, not an intimidating and endless stack of paperwork. I worked hard to create an efficient tax organizer that makes tax preparation faster and easier for you and that includes the important information we need to prepare your return.

Note that the tax organizer is a fillable PDF to make it easier for you to type your answers right into the form. This also makes it faster and easier to read and process.

When something on the tax organizer does not apply to you, simply write "N/A," cross it out, or skip it and move on to the next item. If you are not sure or have a question, write in your question or just write "question?" on that line so we can discuss it before preparing your return.

Most important: A tax organizer is a helpful tool, but it is not a substitute for direct communication with your CPA. If there is an event that occurs or something that happens to you or your business and you are not sure how it might affect your taxes, contact me. We'll discuss it to make sure you take advantage of every opportunity to reduce your tax burden.

Don't spend your weekend agonizing over tax details, trying to determine what number goes in which box, or whether something is deductible. That's my job and I'm happy to do it for you.

THIS YEAR'S DEADLINES

As always, the returns which have **all** of their information to me first will be the first ones completed. Please make sure you send all information needed to complete your returns to me by:

- For business returns, no later than Wednesday, February 18th
- For individual returns, no later than Friday, March 20th

Due to the complexity of this year's returns, tax prep information submitted after the dates above may result in your returns being put on extension. So, please send your information in as early as possible!

I expect the average turnaround time to be two to three weeks per return. Once you have submitted 100% of your information, please give us time to work our magic before asking for a status update. I know everybody wants their taxes done ASAP. The fewer status updates we have to give, the sooner everybody's returns get done!

HOW TO SUBMIT YOUR INFORMATION

Follow these instructions, please, so that we can complete your tax returns faster:

- Fill in the tax organizer as completely as you can before submitting it
- Send us all of your tax prep information at the same time
- Before uploading information to your ShareFile folder, rename each file so that the first word of each file name is your last name (e.g., Smith W-2 2025.pdf, Smith 1095-A.pdf, Smith 1099.pdf)

IMPORTANT TAX UPDATES

Estimated tax payments. If you made federal or state estimated tax payments for tax year 2025, make sure you list the payments in the Estimated Tax Payments section on page 1 in the tax organizer or provide us with the amounts and dates paid.

New deductions in 2025. There are a number of new or expanded deductions:

- Seniors: There is a temporary $6,000 deduction for taxpayers age 65 and older, subject to income limits, for 2025.
- SALT: The state and local tax deduction cap was temporarily increased to $40,000 for 2025.
- Qualified tips and overtime pay: There are limited deductions for qualified tips and overtime pay received in 2025.
- Car loan interest: If you purchased and financed a new passenger vehicle in 2025, the interest on the loan may be deductible.

New federal requirements. President Trump's Executive Order 14247, signed in 2025, applies to tax payments and tax refunds. The executive order mandates that all tax payments to the federal government be made electronically, and that paper check refunds issued by the U.S. Department of the Treasury be phased out. The IRS may issue additional guidance and information prior to the year's filing season. Please let us know if you have questions about how this applies to you.

Tax prep made in the U.S.A. Other tax preparers are sending their clients' tax information overseas for preparation or offshoring data entry. Not here. We feel outsourcing tax returns overseas could endanger the security of your personal information. All tax preparation will be done in-house by our own staff.

ENGAGEMENT LETTERS

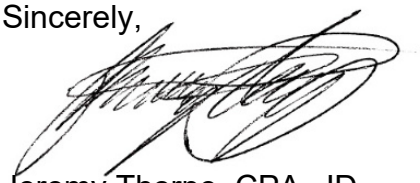
You must sign and return your engagement letter to us before we commence work on your tax returns. Tax returns **will NOT be prepared** for any client until we have a signed engagement letter on file for the 2025 tax year. The 2025 engagement letter is available on our website or through the link in my email signature. We will mail you a paper copy of the engagement letter to sign, upon request.

SPECIAL INSTRUCTIONS FOR NEW CLIENTS

If you are a new client this year, make sure that you include copies of your 2024 federal and state returns with your 2025 tax prep information.

I look forward to helping you take advantage of every opportunity to reduce your tax burden this year. If you have questions, contact me at JThorpe@ThorpeCPA.com or (571) 282-3535.

Sincerely,



Jeremy Thorpe, CPA, JD
Tax, Accounting & Advisory

Tax Year 2025

Client Tax Organizer

Important note: This is a fillable PDF so you can type your answers right into the form.

PART 1: Personal Information

*You must provide phone numbers and email addresses for both spouses in order to e-file the returns.

	Taxpayer				Spouse			
First Name & Middle Initial								
Last Name								
Social Security Number								
Date of Birth								
Occupation								
*Email Address								
*Work Phone		*Cell			*Work		*Cell	
*Home Phone		Fax			*Home		Fax	
Address				Apt/Suite				
City		State		Zip				
Identity Protection PIN, federal**								
Identity Protection PIN, state**								

**If you have an Identify Protection PIN, the IRS would have mailed it to you in January 2026.

Is taxpayer legally blind?	Yes ☐	No ☐	Is spouse legally blind?	Yes ☐	No ☐
Is taxpayer disabled?	Yes ☐	No ☐	Is spouse disabled?	Yes ☐	No ☐
Contribute to presidential campaign fund (taxpayer)?	Yes ☐	No ☐	Contribute to presidential campaign fund (spouse)?	Yes ☐	No ☐

Filing Status

Single ☐ Head of household ☐ Married filing jointly ☐ Married filing separately ☐ Widower ☐ If widower, year of death of spouse _____

Dependents: Children & Others

Name	Relationship	Date of Birth	Social Security Number	Months Lived with You	Disabled (Yes/No)	Full-time Student (Yes/No)	Dependent's Gross Income

Estimated Tax Payments

Did you pay estimated taxes in 2025? Yes ☐ No ☐

If yes, you **must list all estimated tax amounts paid** and the date each was paid.

To avoid paying taxes twice, you must enter all amounts and dates completely and accurately. To determine the amounts paid and on what date, review your bank statements. You should see payments to "IRS" and state entities like "VA Department of Taxation," etc. You likely paid estimated taxes in 4 installments on or around April 15, June 15, and September 15, 2025, and January 15, 2026.

Quarter	Federal		State	
	Amount Paid	Date Paid	Amount Paid	Date Paid
1st Quarter				
2nd Quarter				
3rd Quarter				
4th Quarter				

Please answer the following questions to determine the maximum deductions:

		Yes	No			Yes	No
1.	Did your marital status change during the year?	☐	☐	**12.**	Did you receive a distribution from a retirement plan (401(k), IRA, etc.)?	☐	☐
2.	Did your address change during the year?	☐	☐	**13.**	Did you give a gift of more than $18,000 to one or more people?	☐	☐
3.	Were there any changes in dependents?	☐	☐	**14.**	Did you go through bankruptcy, foreclosure, or repossession proceedings?	☐	☐
4.	Did you receive, sell, exchange, or dispose of any financial interest in virtual currency?	☐	☐	**15.**	Were you notified or audited by either the IRS or a state taxing agency?	☐	☐
5.	Did you receive any unemployment or disability income?	☐	☐	**16.**	If you are self-employed, did you work from a home office or use your car for business?	☐	☐
6.	Did you buy or sell any stocks, bonds, or other investment property?	☐	☐	**17.**	Did you contribute to a retirement plan (401(k), IRA, etc.)?	☐	☐
7.	Did you purchase, sell, or refinance your principal home or second home, or take out a home equity loan?	☐	☐	**18.**	Were you a citizen of, have income from or live in a foreign country?	☐	☐
8.	Did you convert part of all of your traditional/SEP/SIMPLE IRA to a ROTH IRA?	☐	☐	**19.**	Do you want to electronically file your tax return?	☐	☐
9.	Could you be claimed as a dependent on another person's tax return?	☐	☐	**20.**	Did you buy any internet merchandise for which you did not pay sales/use tax?	☐	☐
10.	Did you pay anyone for domestic services in your home?	☐	☐	**21.**	Health Insurance: Did you have ACA - compliant health insurance during the year? **(Attach Form 1095-A, 1095-B, and/or 1095-C)**	☐	☐
11.	Did you pay anyone for childcare services?	☐	☐				

Income

Type of Income	Form(s) to Attach	# Attached	Name of Company Form Was Issued By
Wage & Salary Income	Form W-2s		
Pensions, Annuities, Profit Sharing, IRAs, etc.	Form(s) 1099-R		
Social Security/Railroad Benefits	Form(s) SSA-1099		
Interest Income	Form(s) 1099-INT		
Dividend Income	Form(s) 1099-DIV		
Partnership, S Corp, Trust, Estate Income	Form(s) K-1		
Investments Sold	Form(s) 1099-B & Brokerage Statements (should include date acquired, date sold, cost and sale price)		

New for 2025: Income from Overtime & Tips

Type of Income	Amount
Overtime pay received in 2025, if not indicated on W-2	
Tips received in 2025, if not indicated on Form W-2, 1099, or elsewhere	

Income from Sale of Property

Attach Form(s) 1099-S & Closing Statements. Number of forms attached: _____.

Address of Property Sold	Date Acquired	Cost & Improvements

Other Income

Type	Amount	Type	Amount
Alimony Received Date of Divorce or Separation Agreement: _____		Gambling/Lottery Winnings	
		Disability Income	
		Other	
Jury Duty		Other	
State Income Tax Refund		Other	

Adjustments to Income

Type	Amount	Type	Amount
Alimony Paid Date of Divorce or Separation Agreement: _____ Name: _____ Social Security Number: _____		Tuition and Fees Paid Who was it paid for? _____	
		IRA Contributions – Taxpayer. Check here if: ☐ Traditional IRA ☐ Roth IRA ☐ Backdoor Roth IRA	
		IRA Contributions – Spouse. Check here if: ☐ Traditional IRA ☐ Roth IRA ☐ Backdoor Roth IRA	
Educator Expenses		SEP Contributions – Taxpayer	
Health Savings Account:		SEP Contributions – Spouse	
Amount Contributed for 2025		Student Loan Interest Paid	
Amount Spent on Qualified Healthcare Expenses		Other	

Medical/Dental Expenses Paid

Type	Amount	Type	Amount
Medical Insurance Premiums		Medical Equipment Supplies	
Long-Term Care Insurance		Nursing Care	
Prescription Drugs		Medical Therapy	
Glasses, Contacts		Hospital	
Hearing Aids, Batteries		Doctor/Dental/Orthodontist	
Braces		Mileage	

Taxes Paid

Type	Amount	Type	Amount
Real Property Tax		Other	
Personal Property or Car Tax		Other	

Interest Expense

Type	Amount	Type	Amount
Mortgage Interest Paid		Interest Paid to Individual for Your Home **(attach amortization schedule)** Paid to:_____ Social Security Number: _____ Address:_____ _____	
Investment Interest			
Car Loan Interest. If you purchased a new vehicle in 2025, fill in the information below. **Attach Form 1098-VLI** if available.			
Make & Model			
Date Purchased			
VIN			
Amount of Interest Paid on Vehicle Loan in 2025			

Charitable Contributions

*If your non-cash charitable contributions total over $500, you **MUST PROVIDE RECEIPTS** from the charitable organization showing date of donation, items donated, and value of items. Charitable contributions generally must be made to a qualified U.S.-based nonprofit to be deductible.

Type	Amount	Type	Amount
Total Cash Contributions		Charitable Mileage	
Total Non-cash Contributions: More than $500? ☐ Yes ☐ No. **If yes, attach list**			

Day Care Expenses

	Provider #1	Provider #2
Provider Name		
Address		
EIN/Social Security Number		
Amount Paid		
Children Cared for		

529 Plan Contributions

Name of Dependent or Plan Beneficiary	Name of Owner of Plan	Plan Number	State	2025 Contribution Amount

Health Insurance

Taxpayer	☐ I was insured through the Marketplace ☐ Insured privately, through employer, or Medicaid *Indicate months covered:* ☐ Full year ☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec Was exempt from health care mandate? ☐ Yes ☐ No Has Exemption Certificate Number? ☐ Yes ☐ No	**Attach Form 1095-A, 1095-B, and/or 1095-C** ☐ Not insured at all If yes, provide number
Spouse	☐ I was insured through the Marketplace ☐ Insured privately, through employer, or Medicaid *Indicate months covered:* ☐ Full year ☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec Was exempt from health care mandate? ☐ Yes ☐ No Has Exemption Certificate Number? ☐ Yes ☐ No	**Attach Form 1095-A, 1095-B, and/or 1095-C** ☐ Not insured at all If yes, provide number
Dependent	☐ I was insured through the Marketplace ☐ Insured privately, through employer, or Medicaid *Indicate months covered:* ☐ Full year ☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec Was exempt from health care mandate? ☐ Yes ☐ No Has Exemption Certificate Number? ☐ Yes ☐ No	**Attach Form 1095-A, 1095-B, and/or 1095-C** ☐ Not insured at all If yes, provide number
Dependent	☐ I was insured through the Marketplace ☐ Insured privately, through employer, or Medicaid *Indicate months covered:* ☐ Full year ☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec Was exempt from health care mandate? ☐ Yes ☐ No Has Exemption Certificate Number? ☐ Yes ☐ No	**Attach Form 1095-A, 1095-B, and/or 1095-C** ☐ Not insured at all If yes, provide number

Direct Deposit and Direct Debit Information

Per Executive Order 14247, all **federal** tax payments must be made electronically and refunds must be made electronically (direct deposited). Many states still offer the option of paying or receiving refunds by paper check. Please include the information below for the bank account you wish to use for direct debit and direct deposit. Note: You may still set up **federal** tax payments yourself via irs.gov/payments. Please double-check your routing and account numbers to ensure all are correct. Direct debits are set to process automatically when returns are e-filed. Some may take a week or more to process, but all should process before the filing deadlines. The deadlines for individuals are April 15 for federal, Maryland, and DC, and May 1 for Virginia. If you are using direct debit to pay balances due, please make sure adequate funds are available in your account when you sign your e-file authorizations. You must contact us directly if you need to arrange different timing of direct debits.

Would you like to pay the balance due on your **federal** return using electronic withdrawal? ☐ Yes ☐ No

Would you like to pay the balance of your **state** return(s) using electronic withdrawal? ☐ Yes ☐ No

Would you like any **state** refunds owed to you directly deposited? ☐ Yes ☐ No

Name of bank or financial institution _____

Routing Transit Number (RTN) _____

Account number _____

Type of account: ☐ Checking ☐ Traditional Savings ☐ IRA Savings ☐ Archer MSA Savings ☐ Coverdell Ed. Savings ☐ HSA Savings

Is this a business account? ☐ Yes ☐ No

Account owner: ☐ Taxpayer ☐ Spouse ☐ Joint

Part 2: Self-Employment Information

Are you self-employed? ☐ Yes ☐ No. If no, skip the sections related to self-employment and go to Part 3.

Will you provide me access to your accounting software (e.g. QuickBooks or similar)? ☐ Yes ☐ No.

If yes, skip all sections related to self-employment and go to Part 3.

Business Name _____

Who owns the business? ☐ Taxpayer ☐ Spouse

Gross Receipts _____ EIN of Business _____

Business Expenses

Type	Amount	Type	Amount
Advertising		Taxes	
Commissions/Fees		Travel Expense	
Dues & Publications		Meals & Entertainment	
Interest Expense		Telephone	
Insurance		Utilities	
Legal & Professional Fees		Wages (Gross W-2)	
Office Expense		Postage	
Rent (Office) Expense		Bank Charges	
Equipment Rental Expense		Tools & Equipment	
Auto Expense		Uniforms	
Auto Mileage		Other (please list below)	
Repairs Expense			
Supplies Expense			
Other (please list below)			

Assets Purchased

Description of Asset	Date Purchased	Amount Paid

Expenses Related to The Business

Complete this section only if you are self-employed. Otherwise, skip and go to Part 3.

Auto Expense

Name of the business the vehicle is used for: _____

Year, make and model of vehicle: _____

Purchase price of vehicle: _____

Date vehicle was placed in service: _____

Number of miles the vehicle was driven during the tax year:

Business _____ Commuting _____ Total _____

Check if applicable:

- ☐ Another vehicle is available for personal use
- ☐ This vehicle is available for use during off-duty hours
- ☐ There is evidence to support my deduction
- ☐ The supporting evidence is written

Type	Amount	Type	Amount	Type	Amount
Garage rent		Property Tax		Gas	
Insurance		Repairs		Tires	
Licenses		Tolls		Oil	
Parking fees		Interest		Lease Payments	
Other					

Business Use of Home

Name of business home is used for: _____

What is the square footage of your home that was used regularly and exclusively for business? _____

What is the total square footage of your home? _____

For daycare facilities not used exclusively for business, complete the following questions:

How many days during the year was the area used? _____

How many hours per day was the area used? _____

Was the daycare facility in operation for the entire year? ☐ Yes ☐ No

Expenses	Office Expenses	Home Expenses	
Mortgage Interest			In the “Office Expenses” column, enter those expenses that pertain exclusively to your office. In the “Home Expenses” column, enter those expenses that pertain to the entire dwelling.
Real Estate Taxes			
Excess Mortgage Interest			
Insurance			
Rent			
Repairs & Maintenance			
Utilities			
Other Expenses			

Health Insurance

If you are self-employed, enter the total amount you paid in 2025 for your health insurance premiums and **attach Form 1095-A**, if available	

PART 3: Rental and Foreign Income

Rental Income

	Property #1	Property #2	Property #3	Property #4
Address				
City/State/Zip				
Rental Income				
Expenses:				
Advertising				
Auto & Travel				
Auto Miles				
Cleaning & Maintenance				
Commissions Paid				
Grounds & Gardening				
Insurance				
Interest Expense				
Legal & Professional				
Management Fees				
Repairs & Maintenance				
Supplies				
Taxes				
Utilities				
Association Dues				
Pest Control				
Other				
Other				
Other				
Other				
Other				
Other				

Foreign Financial Account Report

Complete this section if you had ownership of or signature authority over any foreign financial accounts, or if you have signing authority over a foreign trust account – including foreign retirement accounts.

Account Number	Name of Financial Institution	Address of Financial Institution (include street, city, state or province, postal code, and country)	Name(s) of Account Owners	Highest Balance in Account in 2025 (enter amount in foreign currency)	Income type: I=Interest D=Dividend C=Capital Gains	Amount of Income Earned by This Account (enter amount in foreign currency)	If account was opened or closed in 2025, enter O for opened or C for closed	If account was opened or closed in 2025, enter date when opened or closed

Offshore financial assets include bank accounts, brokerage accounts, retirement accounts (for example, employer retirement/pension accounts, Australia's Superannuation Fund, or Canadian RRSP accounts), foreign trusts, or stock holdings. The United States requires all U.S. citizens, green card holders, and people residing in the United States to report ownership or signing authority over foreign financial assets. Severe penalties and even prison time can be imposed on people who willfully ignore these rules.

NOTES: