

# **2024**

## **TAXPAYER ORGANIZER**

This easy-to-use organizer has been prepared to assist you in collecting information for your 2024 Individual Income Tax Return.

If necessary, attach additional sheets with pertinent facts that may not have been requested in this organizer.

If you have any questions, make note of them within the booklet so we may discuss them when we meet to prepare your tax return.

Please provide all records and necessary information requested, including:

- Prior year federal and state return ***(new client only)***
- W-2s for wages, salaries, tips, and pensions
- 1098s for mortgage interest paid to financial institutions
- 1099s for interest, dividends, state tax refunds, retirement, and other payments
- 1095-A for health insurance information if enrolled thru the Marketplace
- K-1s from partnerships, S corporations, estates, and trusts
- Additional correspondence from tax agencies if any

Using this organizer will assist you in compiling complete and accurate tax data that will make it possible to take full advantage of all allowable deductions.

Contact me when you are ready to schedule an appointment to review your information/documents and prepare your 2024 income tax returns. I appreciate the opportunity to serve you.

**Kirby Tax Service**  
**958 Descanso Ave**  
**Clovis, CA 93619**  
**(559) 324-8585**

2024

## TAX INFORMATION QUESTIONNAIRE

The following questions help me understand your current year tax situation. If you are filing jointly, each question also applies to your spouse. Please answer each question by circling yes (Y) or no (N). For every question you answered yes, please provide details in the blank lines at the end of this questionnaire. If a question does not pertain to you, please circle no. If you require help answering any of these questions, please contact me.

1. Did you receive Form 1095 (Health Insurance Marketplace Statement)? Y N
2. Did your marital status change during the year? Y N
3. Were you a resident of, or did you have income in, more than one state? Y N
4. Do you wish to donate \$3, or \$6 if joint return, to the Presidential campaign? Y N
5. Did you have any changes in tax dependents? Y N
6. Are you or any dependents blind and/or disabled? Y N
7. Did you incur childcare or dependent care expenses? Y N
8. Did you make any IRA contributions? Y N
9. Did you pay or receive any alimony? Y N
10. If you're self-employed, did you pay any health insurance premiums? Y N
11. Did you contribute or receive funds to/from a Health Savings Account? Y N
12. Did you make any cash and/or noncash charitable contributions? Y N
13. Did you make any large purchases (i.e., airplane, vehicles, boat, etc.)? Y N
14. Did you purchase, sell, and/or refinance any real estate? Y N
15. Did you have any debt cancelled (receive a Form 1099-C)? Y N
16. Did you receive a First-Time Homebuyer Credit prior to 1/1/2009? Y N
17. Did you incur any child adoption fees? Y N
18. Did you give any gift over \$18,000 to one person? Y N
19. Did you pay wages more than \$2,700 to one household employee? Y N
20. For 2024 TY, do you want estimated tax payment vouchers prepared? Y N
21. Did you make any Federal or State estimated tax payments? Y N

Please use the following blank lines to provide additional information regarding the above questions (indicate the question number).

This space can also be used for any other information or questions you may have.

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