

## 2024 Tax Organizer

**PLEASE DOWNLOAD TO YOUR COMPUTER BEFORE FILLING OUT.**

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2023 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2024 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

Note: The General Questions and worksheets include a variety of questions designed to assist in completing your tax return. Not all questions will be applicable to your situation and can be left blank. If you answer yes to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- ☐ A copy of your 2023 tax return (if not in our possession).
- ☐ Original Form(s) W-2.
- ☐ Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- ☐ Copies of other compensation or pension documentation, such as Form 1099-MISC, Form 1099-R, Form 1099-NEC.
- ☐ Copies of Form 1099-K used to report transactions through a third-party payment network, such as PayPal, Venmo and Zelle.
- ☐ Form(s) 1099 or statements reporting dividend and interest income.
- ☐ Brokerage statements showing transactions for stocks, bonds, etc.
- ☐ Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- ☐ Copies of closing statements regarding the sale or purchase of real property.
- ☐ All other information notices you received, or any items you have questions about.

Please provide all relevant documentation or applicable details for any questions below for which you have answered "Yes"

Health Insurance and Education		
	YES	NO
1. Did you or your spouse have self-employment health insurance?	<input type="checkbox"/>	<input type="checkbox"/>
2. Did you contribute to or receive distributions from a Health Savings Account (HSA)?	<input type="checkbox"/>	<input type="checkbox"/>
3. Did you have a college savings account (e.g.: 529, Educations Savings Account, etc.)? If yes, please enter total 2022 qualified amount:	<input type="checkbox"/>	<input type="checkbox"/>

Direct Deposit of Refund and Foreign Income		
	YES	NO
1. Did you have any foreign income or a foreign account? Please refer to the guidelines on the income section of this organizer.	<input type="checkbox"/>	<input type="checkbox"/>
2. The Internal Revenue Service encourages all taxpayers to opt for a direct deposit of refunds, or a direct withdrawal of taxes owed. If you would like WCPA to handle your payment options, please fill out the information in the next section.	<input type="checkbox"/>	<input type="checkbox"/>
a) If you receive a refund, would you like to choose direct deposit?	<input type="checkbox"/>	<input type="checkbox"/>
b) If you owe income taxes, would you like to choose to have the amount withdrawn from your bank account?	<input type="checkbox"/>	<input type="checkbox"/>

**NOTE: WCPA will not initiate payments or refunds until you have thoroughly reviewed and approved your return.**

**CAUTION: Review information for accuracy. PLEASE PROVIDE A VOIDED CHECK IF POSSIBLE**

1. Name of financial institution: \_\_\_\_\_
2. Routing Number: \_\_\_\_\_
3. Account Number: \_\_\_\_\_
4. Type of Account: \_\_\_\_\_  
Checking: ☐ Savings: ☐



GALLAGHER TAX & INVESTMENT LLC  
 3350-A ANNAPOLIS LN N. PLYMOUTH, MN 55447  
 Telephone: (612) 306-2830

Taxpayer Information		Spouse Information	
Last name.....	Last name.....		
First name.....	First name.....		
Middle Initial.....	Middle Initial.....		
Social security number.....	Social security number.....		
Occupation.....	Occupation.....		
Work phone.....	Work phone.....		
Cell phone.....	Cell phone.....		
E-mail address.....	E-mail address.....		
Date of birth.....	Date of birth.....		
Address .....			
City.....			
Home phone.....			
State....			
ZIP code.....			
Fax number.....			
Apartment/Suite #...			

Dependent Information					
First Name Last Name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expenses

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

Education Tuition and Fees
Provide all Form 1098-Ts and a list of your qualified expenses.
Student Loan Interest Paid
Enter total 2023 Qualified student loan interest.....

**Please provide if you have any of the following income or forms:****Form(s) W-2 - Wages, Salaries, Tips and Other Compensation**


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**Form(s) 1099-R - Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc**


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**Form(s) SSA-1099 - Social Security/Railroad Benefits****Taxpayer****Spouse**

Social Security Benefits from Form SSA-1099 .....

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Railroad Retirement Benefits from Form RRB-1099 .....

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Medicare B, C or D premiums withheld.....

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**Form(s) 1099-MISC - Miscellaneous Income and 1099-NEC**


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**Form(s) 1099-INT - Interest Income**


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**Form(s) 1099-DIV - Dividend Income**


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**Form(s) 1099-B, 1099-S - Sales of Stocks, Bonds, Real Estate, etc.**

Provide all stock sale transaction information, including initial cost information.

**Foreign Income – Foreign Accounts and Trusts (Qualification Criteria)**

- Did you have taxable interest, ordinary dividends or other income from a foreign account; or received a distribution from, or were a Grantor of, or a Transferor to a foreign trust?
- Did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country?
- Did you receive a distribution or were the Grantor of, or Transferor to a foreign trust?

If you answered Yes to any of these questions, provide the name of the foreign country where the financial account is located: \_\_\_\_\_

**Virtual Currency and Cryptocurrency**

All sale or other exchange of virtual currency and cryptocurrency, or use it to pay for goods or services, or receiving it as compensation, or holding it as an investment.

**Other Government Forms to provide:**

Form(s) 1099-G - Certain Government Payments, Schedule K-1s - Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G - Gambling or Lottery Winnings, Form(s) 1099-Q - Payments from Qualified Education Programs

**Other Income:**

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Provide income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

**Retirement Plan Contributions****Taxpayer****Spouse**

Traditional IRA contributions made for 2024 .....

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Roth IRA contributions made for 2024 .....

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SEP, Keogh, Individual 401(k) or SIMPLE Contributions .....

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Medical and Dental Expenses – Please provide total amounts, DO NOT SEND RECEIPTS

Prescriptions & Medications .....	
Health Insurance Premiums .....	
Doctors, dentists, etc.....	
Hospitals, clinic, etc. ....	
Eyeglasses and contact lenses.....	
Miles driven for medical purposes.....	
Other medical and dental expenses:	

Taxes

Real estate taxes paid on principal residence .....	
Real estate taxes paid on additional homes or land.....	
Auto license registration fees based on the value of the vehicle.....	
Other personal property taxes:	

Interest Expenses

Home mortgage interest paid - Provide Form(s) 1098.	
Lender Name	Amount
Points paid on loan to buy, build, or improve main home	
Lender Name	Amount

Charitable Contributions (please provide spreadsheet or receipts)

Cash/Check/Credit Contributions	

Noncash Charitable Contributions	
Please provide all receipts with details listing the following information: Donee, donee address, description of donation, date acquired, and date contributed, your cost, value at time of donation, and how you acquired the property.	

Miscellaneous Deductions

Union and professional dues .....	
Professional subscriptions, books, supplies .....	
Uniforms and protective clothing (including cleaning) .....	
Job search costs.....	
Taxpayer educator expenses.....	
Spouse educator expenses .....	
Tax return preparation fees.....	
Safe deposit box rental.....	
Gambling losses (to the extent of gambling income) .....	
Other expenses:	

## 2024 Questions

1. Did a lender cancel any of your debt in 2023? (Provide any Forms 1099-A or 1099-C)..... ☐ ☐
2. Did you make energy efficient improvements to your home or purchase any energy-saving property during 2023? If yes, please provide details..... ☐ ☐
3. Did you purchase a motor vehicle or boat during 2023?..... ☐ ☐  
If yes, provide documentation showing sales tax paid.
4. Did you purchase a hybrid or electric vehicle in 2023? If yes, enter year, make, model, and date purchased..... ☐ ☐

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5. Did you donate a vehicle in 2023? If yes, provide Form 1098C..... ☐ ☐
6. Did your marital status change during 2023?..... ☐ ☐  
If yes, explain: \_\_\_\_\_
7. Were you or your spouse permanently and totally disabled in 2023?..... ☐ ☐
8. Do you have dependents who must file?..... ☐ ☐
9. Do you have children who are under age 19 or a full-time student under age 24 with investment income greater than \$2,300?..... ☐ ☐
10. Did you provide over half the support for any other person during 2023?..... ☐ ☐
11. Did you incur adoption expenses during 2023?..... ☐ ☐
12. Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?..... ☐ ☐
13. Did you receive any disability payments in 2023?..... ☐ ☐
14. Did you receive tip income not reported to your employer?..... ☐ ☐
15. Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2023? If yes, provide closing or:  
  - a) escrow statements, 1099-C or 1099-A forms?..... ☐ ☐
  - b) If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?..... ☐ ☐
16. Did you incur any casualty or theft losses during 2023?..... ☐ ☐
17. Did you incur any non-business bad debts?..... ☐ ☐
18. Did you pay any individual for domestic services in 2023?..... ☐ ☐
19. Did you take a retirement account distribution related to the corona virus or a natural disaster?..... ☐ ☐
20. Did you buy or sell any stocks or bonds in 2023?..... ☐ ☐
21. Did you use the proceeds from Series EE, or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?..... ☐ ☐
22. Did you incur any moving expenses? If yes, provide details. .... ☐ ☐
23. Did you receive any income not included in this Tax Organizer? If yes, please provide information. .... ☐ ☐
24. Do you expect your income and deductions in 2024 to be the same as 2023? ..... ☐ ☐  
If no, provide explanation of changes expected on last page. ....
25. Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please provide form. .... ☐ ☐
26. At any time during 2023, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ..... ☐ ☐  
  - a) Did you obtain a Paycheck Protection Program (PPP) loan? ..... ☐ ☐
  - b) If yes, has any portion of that loan been forgiven? ..... ☐ ☐
27. Did you pay any alimony in 2023? If yes, enter recipient's SSN, Alimony paid\ and date of divorce:..... ☐ ☐

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28. Enter your state of residence.      Taxpayer: \_\_\_\_\_      Spouse: \_\_\_\_\_

### Estimated Taxes Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

[illegible]