

2025 Tax Year Organizer

Taxpayer Information

Spouse Information

Last Name _____	Last Name _____
First Name _____	First Name _____
Middle Initial _____ Suffix _____	Middle Initial _____ Suffix _____
Social Security _____	Social Security _____
Occupation _____	Occupation _____
Cell Phone _____	Cell Phone _____
Email Address _____	Email Address _____
Date of birth _____	Date of Birth _____
Address _____	
City _____	State _____ Zip Code _____
Home Phone _____	Fax Number _____

Dependent Information

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

Enter total of Student loan interest paid..... _____

Retirement Plan Contributions

Taxpayer & Spouse Combined

Traditional IRA contributions made for Roth	_____
IRA contributions made for ...	_____
SEP, Keogh, Individual 401(k) or SIMPLE contributions	_____

Medical and Dental Expenses

Taxpayer & Spouse Combined

Prescription medications.....

Health Insurance Premiums.....

Doctors, dentists, etc.

Hospitals, clinics, etc.....

Eyeglasses and contact lenses.....

Miles driven for medical expenses.....

Other Medical Expenses:

Taxes

Taxpayer & Spouse Combined

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

Lender's Name for Home mortgage interest paid

Taxpayer & Spouse Combined

Lender's Name for points paid on loan to buy, build or improve main home

Cash/Check/Credit Charitable Contributions

Taxpayer & Spouse Combined

Noncash Charitable Contributions

Attach 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.

Ask for our donation valuation guide or go to www.vatruck.com

Miscellaneous Deductions

Taxpayer & Spouse Combined

Gambling losses (to the extent of gambling income)..... _____
 Investment loan Interest _____

Estimated Tax Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID
April 15 th , 2025							
June 15 th , 2025							
Sept 15 th , 2025							
Jan 15 th , 2026							

Direct Deposit of Refund or ACH withdrawal

If you receive a refund, would you like direct deposit? Yes No
 If you owe taxes, would you like to automatically have it deducted from your bank account? Yes No

What type of account is this? Checking or Savings (Please circle)
 If **YES** and we have your banking information from previous return, we will verify information is correct.
 If **YES** and we don't have the information on file, please provide a voided check (not a deposit slip).

Questions

1. Did a lender cancel any of your debt in 2025? (1099-C) Yes No
2. Did you install solar energy on your home during 2025? If **yes**, please attach details Yes No
3. Did you purchase a motor vehicle or boat during 2025? If **yes**, attach documentation showing sales tax paid. Yes No
4. Did you purchase an electric vehicle in 2025? If **yes**, enter year, make model, date purchased and purchase amount:

5. Did you donate a vehicle in 2025? Yes No
6. Did your marital status change during 2025? Yes No
 If **yes**, explain: _____
7. Were you or your spouse permanently and totally disabled in 2025? (Must provide medical certificate) Yes No
8. Do you have dependents who must file? Yes No
9. Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2100?..... Yes No
10. Did you provide over half the support for any other person during 2025? Yes No

11. Did you incur adoption expenses during 2025?.....
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 2025?
14. a. Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2025?
If yes, attach closing or escrow statements, 1099-S or 1099-A forms
b. If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?
15. Did you incur any non-business bad debts? (i.e. short sale of a home)
16. Did you pay any individual for domestic services in 2025? (i.e. caregiver)
17. Did you buy or sell any stocks or bonds in 2025?
18. Did you use the proceeds from Series EE, or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?
19. Did you receive any income not included in this Tax Organizer? If **yes**, please attach information.....
20. Do you expect your income and deductions in 2025 to be the same as 2024? If **no**, attach explanation of changes expected.....
22. Did you have health insurance?
23. If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____
24. Enter your state of residence. Taxpayer: _____ Spouse: _____