

Hope's Tax Service - 2024 TAX ORGANIZER

PERSONAL DATA - MUST PROVIDE ID FOR TAXPAYER And SPOUSE

Taxpayer's Name

Spouse's Name

Address

Cell #

E-mail Address:

Other #

alternate E-mail Address:

Social Security Number

Date of Birth

Occupation

You

Spouse

IDENTIFICATION INFORMATION

Taxpayer's type of Photo ID

Spouse's type of Photo ID

☐ Driver's License ☐ State-issued Photo ID

☐ Driver's License ☐ State-issued Photo ID

Photo ID number

Photo ID number

State ID was issued

State ID was issued

Date ID was issued

Date ID was issued

Date ID expires

Date ID expires

DEPENDENT CHILDREN & OTHER DEPENDENTS DATA

Name

Date of Birth

Social Security #

Relationship

Is your direct deposit the same as
as last year? **YES OR NO**

DIRECT DEPOSIT OF REFUND

Routing Number

Acct Number

Bank Name

Checking or Savings

INCOME

Wages Earned

Taxpayer Employer Name

Spouse Employer Name

Taxpayer Employer Name

Spouse Employer Name

Unemployment?

Unemployment?

Retirement or Social Security?

Retirement or Social Security?

Self-employment?

Interest/Dividend Income Received

Payor

Amount

Please provide income and expenses. Expenses can include

all receipts, mileage, home office deduction for self-employment business

Any other income?

Sale of stocks or bonds or crypto?

Rental property?

MEDICAL EXPENSES (exp must exceed 7.5% of your adj gross income)	
Prescription Medicines	\$
Medical Insurance Prem.	\$
Long-Term Care Ins. Prem's	\$
Doctors/Dentists/Eye Exams	\$
Hospital	\$
Nursing Home	\$
Glasses/Contact Lenses	\$
Hearing Aids/Batteries	\$
Medical Supplies/Equipment	\$
Medical Travel (# of Miles)	\$
Parking/Lodging	\$
Medical Reimbursements	\$
Other Medical	\$

TAXES PAID	
Fed. Tax pd w/ 2023 return	\$
IA Tax pd w/ 2023 return	\$
NE Tax pd w/ 2023 return	\$
Real Estate Tax-Home	\$
Auto Registration Tax	\$

INTEREST EXPENSES		
Home Mtg (1st home)		\$
Home Mtg (2nd Mtg or 2nd home)		\$
What was 2nd Mtg used for?		

CHARITABLE CONTRIBUTIONS			
Check	\$	Cash	\$
Payroll deduction	\$	Other	\$

CHARITABLE NON-CASH CONTRIBUTIONS			
	Date donated	Cash Value	FMV
Goodwill		\$	\$
Salvation Army		\$	\$
Other		\$	\$

EDUCATION COSTS (include 1098-T from college)	
Student Name	Tuition/Fees Pd.
	\$
	\$
College Savings Plan contributions?	\$

CHILD CARE EXPENSES		
Amount	Name & Address of Provider	SSN/EIN

ENERGY EFFICIENT HOME IMPROVEMENT...TAX CREDITS WE NEED THE INVOICE		
Date	Type of Improvement	Amount
		\$
		\$

OTHER DEDUCTIONS		
Alimony Pd if ded \$	Gambling Losses (up to amount	Roth IRA Contributions \$
IRA Contributions \$	of claimable winnings) \$	

Additional Law Enforcement Deductions Checklist:
(only to be used for Off-duty Income)

UNIFORMS
Uniforms
Badges, Emblems, Insignia
Belts
Clothing
Dry Cleaning

PROFESSIONAL
Licenses, Permits
Union Dues
Association Dues
Professional Dues
Range Dues
Subscriptions
Seminars
Books, Manuals, Classes
Supplies

EQUIPMENT/SUPPLIES
Ammunition/Pouch
Camera, Film, Etc
Flashlight, Bulb, Batteries
Equipment Repairs
Safety Equipment
Guns
Mace
Maps
Whistle
Baton
Pager, Beeper
Cell Phone

TRAVEL
RT Mileage To/From 1099 Jobs