

BRACEY'S PROFESSIONAL TAX SERVICE

BRACEYSTAX.COM 3 0 1 . 7 8 2 . 7 6 0 0



Tax Filing Tips

- As W2's, 1099's, investment earnings and mortgage statements arrive, put them in a folder or secure area.
- Ask your child care provider for their tax identification number.
- Have your taxes prepared early; avoid last minute filing.
- Check your records for out of pocket medical and dental expenses. Don't forget mileage.
- Employer deferred 401K and 403B plan accounts are the best way to save on your taxes and build your retirement.
- You must have your dependent's social security number in order to claim them on your tax return.

BPTS,Inc. strives to make your tax filing experience pleasant and rewarding.

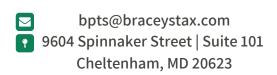


Providing prompt,
personable,
reasonable,
reliable, year-round
tax and financial
services, making
clients our first
priority.

Serving you for over 40 years.

2024 Tax Organizer





2024 Tax Organizer Income Items

□Wages
☐ Bonus/Commissions
☐ Cancellation of Debt Income
☐ State Tax Refunds
Alimony
☐ Unemployment Compensation
☐ Social Security
1099 Income/Statements (All)
Gambling - W2G
401K Withdrawals
Pension Plans
Profit Sharing
Interest Dividend Income (please list) Savings CD Money Market
Interest Dividend Income (please list)
Interest Dividend Income (please list) Savings CD Money Market

Taxes(\$10K cap)

☐ Real Estate ☐ State/Local Taxes ☐ Personal Property ☐ Other:
Interest Paid
 ☐ Home Mortgage ☐ Home Equity/Line of Credit ☐ HUD-1 Settlement Statement (Purchase or Refinance) ☐ Deductible Points ☐ Investment Interest ☐ Student Loan Interest
Child Care Expenses (Must have the following information) Name: Address: Tax ID#:
Other Itemized Deductions
Other Itemized Deductions
Other Itemized Deductions Gambling Losses Estate Taxes Ponzi Scheme Losses
☐ Gambling Losses ☐ Estate Taxes

Employee Business Expense NO LONGER AVAILABLE

(with a few exceptions)

Contributions

Church: \$
Charities: \$
Other than cash:
Purple Heart:
Amvets:
Salvation Army:
Big Brothers Big Sisters:
Goodwill:
Other 501(c3) Charities:
Volunteer Work Expenses:
Valuate ex Miles ese.
Volunteer Mileage:
Medical Dental Expenses Expenses must exceed 7.5% of AGI. Pretax expenses are not deductible.
Medical Dental Expenses Expenses must exceed 7.5% of AGI. Pre-
Medical Dental Expenses Expenses must exceed 7.5% of AGI. Pre- tax expenses are not deductible.
Medical Dental Expenses Expenses must exceed 7.5% of AGI. Pretax expenses are not deductible. Insurance Premiums
Medical Dental Expenses Expenses must exceed 7.5% of AGI. Pretax expenses are not deductible. Insurance Premiums Prescription Drugs
Medical Dental Expenses Expenses must exceed 7.5% of AGI. Pretax expenses are not deductible. Insurance Premiums Prescription Drugs Doctor Dental
Medical Dental Expenses Expenses must exceed 7.5% of AGI. Pretax expenses are not deductible. Insurance Premiums Prescription Drugs Doctor Dental Chiropractor
Medical Dental Expenses Expenses must exceed 7.5% of AGI. Pretax expenses are not deductible. Insurance Premiums Prescription Drugs Doctor Dental Chiropractor Hospital

