

Olson & Associates LLC  
2025 Individual Tax Organizer

Section	Question	Answer
Client Information	Is this a joint return?	
Client Information	What year is this for?	
Client Information	Your Name	
Client Information	Your email address	
Client Information	Did you get married, separated, or divorced in 2025?	
Client Information	Your occupation	
Client Information	Was there a change in the number of your dependents in 2025?	
Client Information	Did your address change in the past year?	
Client Information	Foreign Address	

Client Information	Can you be claimed as a dependent by another taxpayer?	
Client Information	Do you have any children under age 19 or college students under 24 with unearned income in excess of \$2,700?	
Client Information	Did you pay any student loan interest in 2025?	
Client Information	Did you maintain a home for someone not claimed as a dependent?	
Client Information	Did you have child care expenses in 2025?	
Client Information	Are you in the military?	
Bank and Financial Info	If your return shows a refund you would like it:	
Bank and Financial Info	Did you own any type of cryptocurrency during the past calendar year, even if you did not buy, sell, or exchange it?	
Bank and Financial Info	Did you have any non-US based bank or investment accounts during the last calendar year? Please note that answering "yes" does not necessarily mean that any additional tax will be owed.	
Health Insurance	Did all members of your household have healthcare coverage last year?	
Health Insurance	Did you purchase health insurance through a government marketplace?	

Health Insurance	If you worked for yourself did you pay health insurance premiums for yourself and your family?	
Health Insurance	Did you receive any disability income last year?	
Purchase, Sales and De	Did you sell, exchange, or purchase any real estate during the year?	
Purchase, Sales and De	Closing Statement Attached	
Purchase, Sales and De	Did you dispose of any stock during the year?	
Purchase, Sales and De	Did you participate in inputs or stock transactions?	
Purchase, Sales and De	Did you take out a home equity loan, line of credit, or refinance any property?	
Purchase, Sales and De	Closing statement attached below	
Purchase, Sales and De	Did you purchase any hybrid (gas/electic) auto? If no leave blank, if yes include make/model and year below	
Income	Did you or your spouse earn tips or overtime in 2025? If so, please upload your last check stub for the year.	
Income	Did you have self employment income in 2025?	

Income	Did you receive income from property sold prior to this year?	
Income	Did you receive executor or jury duty fees?	
Income	Did you receive employer - provided education assistance?	
Income	Did you or your spouse receive Social Security payments in 2025?	
Income	Did you or your spouse receive unemployment and/or paid family leave payments in 2025?	
Income	Did you earn any income in a foreign country last year, or pay foreign taxes?	
Income	Did you receive damage award for personal injury, sickness or discrimination?	
Income	Did you receive alimony? (NOT child support)	
Income	Did you cash in any US savings bonds?	
Income	Did you donate to any charities by cash/check/credit card in 2025?	
Income	Did you start a business, purchase rental property, or invest a significant amount into a partnership, LLC, or S-corporation?	

Income	Did you dispose of a business in 2025?	
Income	Did you purchase, sell, or refinance your principal or second home in 2025?	
Income	Did you make any solar, wind, geothermal, or fuel cell improvements to your home?	
Income	Did you receive any lump-sum payment from a pension or profit sharing plan?	
Income	Did you make any retirement contributions for last year?	
Income	Did you make any rollovers or withdrawals from any retirement accounts?	
Income	Did you contribute to an HSA account last year?	
Income	Did you take money out of an HSA in 2025?	
Income	Did you have any debts cancelled or forgiven last year?	
Income	Did you or any of your dependents receive a distribution from an Education Savings Account or 529 plan?	
Income	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school last year?	

Income	Did you contribute to a 529 plan?	
Deductions, Credits	Did you finance a new, personal-use vehicle in 2025? If the vehicle had final assembly in the U.S, you may be able to deduct up to \$10,000 of interest.	
Deductions, Credits	Did you incur an unreimbursed casualty or theft loss greater than 10% of your income?	
Deductions, Credits	Did you work out of town during the year?	
Deductions, Credits	Did you pay alimony or child support?	
Deductions, Credits	Did medical expenses exceed 7.5% of your income?	
Deductions, Credits	Did you have moving or job seeking expenses?	
Deductions, Credits	Are you a teacher or school administrator who provided school supplies for your job?	
Deductions, Credits	Do you own or invest in a business that is considered manufacturing?	
Deductions, Credits	Did you pay sales tax on a car, boat, motorhome, manufactured home, truck, motorcycle, or plane purchased for personal use?	
Deductions, Credits	Have you started the adoption process?	

Deductions, Credits	Did you start a new pension plan?	
Deductions, Credits	Did you make energy efficient improvements to your home in 2025?	
Miscellaneous	Did anyone in your household receive a distribution from or was the grantor of a foreign trust or estate?	
Miscellaneous	Did you make or receive any gifts of more than \$19,000 to any individual last year? A gift is generally not taxable to the recipient.	
Miscellaneous	Did you engage in any bartering transaction?	
Miscellaneous	Are you covered by a pension plan?	
Miscellaneous	Do you have stock options?	
Miscellaneous	Did you engage the services of any full time household employees? This is usually a full time groundskeeper, nanny, housekeeper, etc and does not refer to helpers or businesses which come for a few hours per week or less.	
Miscellaneous	Did you receive correspondence from federal, state tax authorities in 2025?	
Miscellaneous	Do you have a current will for financial and health care decisions?	
Miscellaneous	Is there anything else about your income or deductions in 2025 that you think we should know about?	