Individual Taxpayer Organizer

BAY AREA
TAX RETURN PREPARERS

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Taxpayer			Tax ID # *	
First Name *M.I.* *Last Name*		Email		IP PIN
Occupation	Date of birth		Are you new to our firm? Yes No	
Address	City		State	Zip
County	Primary phone		Secondary phone	
Driver's License *No.*		*State* *Issue Date*	*Exp. Date*	

Spouse			Tax ID # *	
First Name *M.I.* *Last Name*		Email		IP PIN
Occupation	Date of birth		Are you new to our firm? Yes No	
Address (If different from Taxpayer)	City		State	Zip
County	Primary phone		Secondary phone	
Driver's License *No.*		*State* *Issue Date*	*Exp. Date*	

If you moved during 2024, enter your previous address.	Date of move

Marital status on 12/31/24: Single Married Separated Surviving Spouse Registered Domestic Partnership (RDP)

Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No

Note: Individuals in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.

Names of dependent children *Child's full name*	*Tax ID # **	*IP PIN*	*Date of birth*	*Months lived in home in 2024*	*Relationship*	*College student?*

Did any of the children have unearned income of $1,300 or more? Yes No Do any of the children have a disability? es Io

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2024? Yes No

Other dependents or people who lived with you

Name	*Tax ID # **	*IP PIN*	*Date of birth*	*Months lived in home in 2024*	*Relationship*	*Income*

Bank information: Use for Direct deposit of refund Direct debit of balance due *Name of bank*

Checking *Savings*	*Routing transit number*	*Account number*

Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.

*A Tax ID # is a Social Security Number (SSN), adoption taxpayer identification number (ATIN), or an individual taxpayer identification number (ITIN).

Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse—ask your preparer if you are unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?		
	Yes	No	Have you received any notice from the IRS or state revenue department within the past year? If yes, provide a copy.		
	Yes	No	Did you pay or receive alimony in 2024? *Paid* *Received* $	*Recipient's SSN*	*Date of divorce or separation*
	Yes	No	Did you purchase health insurance through a public exchange/marketplace? (Provide Form 1095-A.)		
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?		
	Yes	No	Did you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home?		
	Yes	No	Did you purchase an energy-efficient, hybrid, or electric vehicle?		
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?		
	Yes	No	Are you a member of the military?	State of residency	
	Yes	No	Were you a citizen of or did you live in a foreign country?	Foreign country	
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? *Maximum value in 2024* $		
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? *Designee's name*	*Phone number*	*PIN (any five digits)*
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2024? *(Provide statement for other expenses.)*		
	Yes	No	Were any children attending college? *(Provide Form 1098-T and Form 1098-E.)*		
			Year in college — Paid by you: *Tuition* $	*Books* $	*Student loan interest* $
			Paid by student: *Tuition* $	*Books* $	*Student loan interest* $
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?		
			Student	*Amount paid* $	
			Name and address of school		
	Yes	No	Did you pay for child or dependent care so you could work or go to school? *(Provide statement if applicable)*		
			Name of provider	*EIN or SSN*	
			Address	*Amount paid* $	
	Yes	No	Did you make any contributions to a 529 plan in 2024? If yes, provide details.		
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2024?	Traditional IRA	Roth IRA
	Yes	No	Did you roll over any amounts from a retirement account in 2024?		
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?		
	Yes	No	Did you receive any income from an installment sale?		
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2024?		
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2024?		
	Yes	No	Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? *(Digital assets include cryptocurrencies, NFTs, and stablecoins)*		
DEDUCTIONS	Yes	No	Did you, or do you plan to, contribute money by April 15, 2025 to an HSA for 2024? If yes, provide details.		
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.		
	Yes	No	Did you pay sales taxes on a major purchase in 2024, such as a vehicle, boat, or home?		
	Yes	No	Did you make any charitable contributions in 2024? If yes, provide details.		
BUSINESS	Yes	No	Did you work from a home office or use your car for your business?		
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?		
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?		
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.		
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.		
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.		
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?		
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.		

State information Full-year resident Part-year resident Nonresident School district

States of residence during 2024 and dates — Do you rent or own your home? Rent Own

Total rent paid $ Includes heat? Yes No

Income Worksheet

Provide to your preparer all Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, 1099-NEC, 1099-K, and other income reporting statements. Do not list dollar amounts for the following forms. Your preparer will report the appropriate amounts.

Indicate "T" for taxpayer, "S" for spouse, "J" for joint — Provide additional statements if more room is needed

Forms W-2—*Wage and Tax Statement*

T/S	Employer name	T/S	Employer name
	1)		4)
	2)		5)
	3)		6)

Forms 1099-INT—*Interest Income*

T/S/J	Name of issuer	T/S/J	Name of issuer
	1)		4)
	2)		5)
	3)		6)

Forms 1099-DIV—*Dividends and Distributions*

T/S/J	Name of issuer	T/S/J	Name of issuer
	1)		4)
	2)		5)
	3)		6)

Forms 1099-R—*Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, Etc.*

T/S	Name of issuer	T/S	Name of issuer
	1)		4)
	2)		5)
	3)		6)

If the distribution is before age 59½, give a reason to determine if an exception to penalty applies.

Tax-Exempt Interest (such as municipal bonds—include statement)

Payer	$	Payer	$

Other Income

State tax refund	$	Unreported tips	$
Unemployment compensation	$	Other	$
Social Security (taxpayer)—provide SSA-1099 or RRB-1099	$		$
Social Security (spouse)—provide SSA-1099 or RRB-1099	$		$
Gambling income—provide Form W-2G	$		$
Business income (see *Sole Proprietorship Tax Organizer)*		Stock sales	See *"Sales and Exchanges Worksheet"* below.
Rental income (see *Rental Property Tax Organizer)*		Sale of other property	

Sales and Exchanges Worksheet

Provide information about sales of stock, real estate, or other property, along with Forms 1099-B, 1099-S, or other supporting statements.

Description of property	*Purchase date*	*Cost/basis*	*Sale date*	*Sale price*
		$		$
		$		$
		$		$

Notes:

- When stock is sold, you will usually receive Form 1099-B, *Proceeds From Broker and Barter Exchange Transactions,* reporting the proceeds from the sale. However, your statement will not always provide the cost/basis information necessary to compute gain or loss. If the statement does not contain the cost/basis information, you must provide it. You may need to contact your broker for questions about cost/basis and purchase dates of your stock accounts.
- Often, "transfers" of stock or mutual funds within a brokerage account are actually sales of one type of stock and purchase of another. Even if you did not receive any cash from the transaction, you may have taxable gain or loss.
- If your stock dividends are automatically reinvested, the dividends will be taxable even though you did not receive any cash. The transaction is treated as if you had received cash and purchased additional stock. When the stock is sold, the amount reinvested over the years is taken into account. You may need to contact your broker for questions about the amount of reinvested dividends.
- If you sold property other than stock, your taxable gain or loss will be determined by your cost/basis. The cost/basis is usually the original purchase price plus improvements (the cost of repairs and maintenance are not taken into account for cost/basis).

Itemized Deductions Worksheet

Deductions must exceed $14,600 Single, $29,200 MFJ/QSS, $21,900 HOH, or $14,600 MFS to be a tax benefit.

Medical Expenses. Must exceed 7.5% of income to be a benefit—include cost for dependents—do not include any expenses that were reimbursed by insurance or paid with funds from an FSA, HSA, or HRA.

Dentists	$	Hospitals	$
Doctors	$	Insurance	$
Equipment	$	Prescriptions	$
Eyeglasses	$	Other	$

Medical miles: ________________ @ 21¢

Taxes Paid. Do not include taxes paid for full or partial business or rental-use property, including business use of the home.

State withholding	*Reported on W-2*
State estimated taxes—paid in 2024	$
Real estate tax—residence	$
Real estate tax—other	$
Personal property taxes	$
Property tax refund—received in 2024	$ ( )
Foreign tax paid	$
Other	$
Other	$
Other	$
Balance paid in 2024 from prior year state returns (do not include interest or penalties)	$

Did you keep receipts for sales tax paid during 2024? Yes No
Did you purchase a car, plane, boat, or home in 2024? Yes No
Sales tax paid $ *Purchase paid* $ *Date*

Interest Paid. Do not include interest paid for full or partial business-use or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers.

Main home	$	Equity loan	$
Second home	$	Equity loan	$
Points	$	Investment interest	$

Charitable Contributions. If over $500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all contributions.

Monetary (cash, check, credit card)	$
Noncash contributions (FMV). Clothing or household items must be in good used condition or better.	$
Did you transfer funds from an IRA directly to a charity? Yes No	$

Charitable mileage ________________ @ 14¢

Casualty and Theft Losses

If you suffered any sudden, unexpected damage or loss of property, or a theft in a federally-declared disaster area, provide details to your tax preparer. Yes No

Miscellaneous Itemized Deductions. Miscellaneous itemized deductions subject to the 2% AGI limitation are not deductible on the federal return. However, these expenses may be deductible on your state return. For use of home, auto mileage, or other job-related expenses, provide information on a separate sheet. Were any expenses reimbursed by your employer? Yes No

Dues	$	Subscriptions	$
Investment expenses	$	Supplies	$
Job education	$	Tax prep fees	$
Job seeking	$	Tools	$
Legal fees	$	Uniforms	$
Licenses	$	Union dues	$
Safety equipment	$	Other	$

Other Deductions. The following deductions are not subject to the 2% AGI limitation.

Gambling losses	$	Federal estate tax on IRD	$
Impairment-related expenses	$	Other	$

Other Deductions or Questions

Notes:
- Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.
- Work clothing is not deductible if adaptable for every day wear. Exception for safety equipment, such as steel-toe boots.
- Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible.

Adjustments Worksheet

Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum $300 each.	$
Health savings account (HSA). Contributions for 2024 may be made through April 15, 2025. *(Only include contributions you made out-of-pocket).*	$
Self-employed SEP, SIMPLE, and qualified plans. Contributions for 2024 may be made through April 15, 2025.	$
Self-employed health insurance. Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.	$
Penalty on early withdrawal of savings.	$
IRA deduction. For traditional IRAs. Roth IRAs are not deductible. Contributions for 2024 may be made through April 15, 2025.	$
Student loan interest. Paid for taxpayers and dependents.	$
Moving expenses. Available only to members of the Armed Forces (or their spouses or dependents) on active duty that move pursuant to a military order and incident to a permanent change of station.	Ask preparer
Business expenses of reservists, performing artists, and fee-based government officials.	Ask preparer
Other adjustments. Include description.	$

Estimated Tax Payments — Tax Year 2024

Installment	*Date paid*	*Federal*	*Date paid*	*State*
First		$		$
Second		$		$
Third		$		$
Fourth		$		$
Amount applied from 2023 overpayment		$		$
Total		$		$

Tax Preparation Checklist

Please provide the following documentation:

- ☐ All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.
- ☐ Form 1095-A (for health insurance purchased through a public exchange/marketplace), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).
- ☐ If you are a new client, provide copies of last year's tax returns.
- ☐ The completed Individual Income Tax Organizer. ***Note:*** If you choose not to fill out the organizer, you must at least answer the "Yes" or "No" questions under "Questions—All Taxpayers."
- ☐ Copy of the closing statement if you bought, sold, or refinanced real estate.
- ☐ Mileage amounts for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage.
- ☐ Detail of estimated tax payments made, if any.
- ☐ Income and deductions categorized on a separate sheet for business or rental activities.
- ☐ List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions.
- ☐ Copy of all acknowledgement letters received from charitable organizations for contributions made in 2024.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a duplicate copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer *Spouse* *Date*

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your express written permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

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