

2024 TAX ORGANIZER



Taxpayer Name:

Cell No:

Spouse Name:

Cell No:

1. Are there any changes to your tax status or dependents?
2. Did you have any foreign accounts that you had signing authority over that exceeded \$10k in total at any point in 2024?
3. At any time during 2024, 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?
4. Please provide your 2024 mileage total for any Schedule C (small business) or Schedule E (rental property) that is included on your tax return. Or, select "Attached Summary" and include totals per property and / or business on a separate page.
5. Did you make any Health Savings Account (HSA) contributions that were not through your employer in 2024?
6. Did you make any Individual Retirement Account (IRA) contributions that were not through your employer in 2024? Traditional or Roth?
7. Did you make any residential energy improvements in 2024 (windows, insulation, exterior doors, home energy audits, air conditioner, water heater, furnace, electrical components, solar panels, or heat pumps)?
8. Is there anything else you would like to discuss along with your tax preparation?