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TAX ORGANIZER

Tax Year 2025

Happy New Year! With the new year comes our favorite time of the year…. tax season! Who's ready? We are!

This is a big year for us in a couple of ways. The first being it's our tenth anniversary of Smith & Harding Associates. I'd like to personally thank every one of our clients from that entire ten years. We appreciate your trust and loyalty and I look forward to a long future together.

The other part of this being a big year is there are some pretty significant changes in tax codes this year. The OBBBA (One Big Beautiful Bold Act) that was signed into law July 4, 2025 should help to reduce overall tax for many taxpayers. With this act there are aspects of taxes that will increase the complexity of most returns. We will need additional documents for some of these credits and there will be more manual calculations required for correctly filed tax returns. We are finalizing our tax organizer for this year now. As soon as it is complete we will send them to you electronically as well as have hard copies available at our office.

With that said we will be changing our tax preparation model and will no longer prepare taxes while meeting with our clients. Preparing accurate returns is always our number one priority and there is just too much room for error with the new changes. We will need undivided attention to each return and making this change will allow for that. This will allow us to work exclusively on each return with no distractions to ensure accuracy and compliance with all of the new changes. That does not mean that you won't have the opportunity to sit down with your preparer if necessary. We will have review appointments available after your return is complete that can be scheduled if needed.

So what will this look like? As soon as you have all of your documents together you can either drop them off to our office in person Monday thru Friday between the hours of 9 am - 5 pm or any time day or night to our secured document box at the front door or you can upload them electronically to our secure portal. Your return will be completed in the order it is received and you'll be contacted to sign the return so it can then be efiled. If we don't have all of your documents you will then go back in line according to when we do receive all of the necessary documents. If you need an appointment to review the return or you have any questions for your preparer it is then that one can be set up for you or you can choose an available time from our electronic schedule system.

We look forward to this tax season but most importantly the changes that should result in lower taxes for our clients. We'll see you all soon and HAPPY TAX SEASON 2026!

Tax Organizer

Smith & Harding Associates has created this tax organizer for you to use to help compile your tax information for the current tax year. If there is a certain area that doesn't apply to your tax situation, please just indicate so with an N/A. For new clients please complete this in its entirety. For returning clients please complete areas that need updating since your last filed return with us. We will need copies of all tax forms used in the preparation of your tax return as well as ID's and birth certificates and social security cards of any dependents new to your tax return or for clients new to Smith & Harding Associates. Other documentation may be required for certain credits as well. If additional space is necessary please use the back side of the last page. Thank you and as always, we look forward to working with you.

Tax Year: 2025

	First Name	Initial	Last Name	Suffix	Social Security Number
Taxpayer					
Spouse					

	Occupation	Date of Birth	Check if: Disabled	Blind	Dependent of Another
Taxpayer					
Spouse					

Home Address & Apt #	
City, State & Zip Code	
School District	

Home Phone	
Cell Phone	
Email	

	State Issued ID or Driver's License Number	Issuing State	Issue Date	Expiration Date
Taxpayer				
Spouse				

Filing status

	Single		Married filing joint		Married filing separate		Head of household		Qualifying widower

Dependent Information

	First Name	Initial	Last Name	Social Security Number	Relationship	Months in home	Date of Birth	Disabled or full-time student
1								
2								
3								
4								
5								

Federal, State and Local or Other Estimated Taxes Paid

Federal	Q1		Q2		Q3		Q4	
	Date paid:	Amount paid:	Date paid:	Amount paid:	Date paid:	Amount paid:	Date paid:	Amount paid:
State	Q1		Q2		Q3		Q4	
paid to state:	Date paid:	Amount paid:	Date paid:	Amount paid:	Date paid:	Amount paid:	Date paid:	Amount paid:
Local	Q1		Q2		Q3		Q4	
paid to locality:	Date paid:	Amount paid:	Date paid:	Amount paid:	Date paid:	Amount paid:	Date paid:	Amount paid:

Tax Organizer

General Questions

Please check if "yes" and provide documentation as necessary.

__ 1. Has your marital status changed?
__ 2. Have you been notified by the IRS of changes to a prior years return or received any other tax correspondence?
__ 3. Are you and/or your spouse being claimed as a dependent by another person?
__ 4. Are there any changes in the dependent information from the prior year?
__ 5. Did you have any children under the age of 19 (or 24 if a full-time student) who received more than $1,250 in investment income?
__ 6. Do you have dependents who are neither U.S. citizens nor U.S. residents?
__ 7. Did you provide over half of the support for another person (or persons) during the year?
__ 8. Did you purchase or sell a personal residence?
__ 9. Did you receive payment from a pension or profit-sharing plan?
__ 10. Did you receive any distributions from an IRA or other qualified plan?
__ 11. Did you receive any disability income?
__ 12. Did you receive any foreign income or pay any foreign taxes?
__ 13. Did you receive interest from a bank account or other financial account based in a foreign country?
__ 14. Were you the grantor or transferor of a foreign trust?
__ 15. Were either you or your spouse enlisted in the military or National Guard?
__ 16. Did you file form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2025?
__ 17. Did you claim a first-time homebuyer credit for a home purchased in 2008?
__ 18. Did you receive proceeds from an installment sale?
__ 19. Did you make a loan at an interest rate below the market rate?
__ 20. Did you make any gifts of more than $17,000 to any one person?
__ 21. Were there any changes to a prior year's income, deductions or tax credits?
__ 22. Did your employer pay premiums on life insurance in excess of $50,000?
__ 23. Were any payments made on student loans?
__ 24. Did you pay any educational tuition or fees for you or a dependent?
__ 25. Did you purchase an electric hybrid vehicle in 2025?
__ 25. Did you purchase and install solar panels in 2025?
__ 26. Did you refinance a mortgage or take out a home equity loan?
__ 27. Were any contributions made to a traditional or Roth IRA for 2025?
__ 28. Did you make any contributions to a Health Savings Account (HSA) in 2025?
__ 29. Did you receive an early retirement distribution for a qualified birth or adoption or a child in 2025?
__ 30. Did you have health insurance through the Marketplace in 2025?

Business and Investment Questions

__ 1. Did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency?
__ 2. Did you receive stock from a stock bonus plan with your employer?
__ 3. Did you buy or sell any stocks or bonds?
__ 4. Did you surrender any U.S. savings bonds?
__ 5. Did you suffer a casualty or theft?
__ 6. Did you start a business, purchase a rental property or farm or acquire interests in any partnerships or S Corps?
__ 7. Did you sell any property or equipment on installments?
__ 8. Did you incur any business-related educational expenses?
__ 9. Did you purchase any special fuels for non-highway use?
__ 10. Did you make any contributions to a self-employed SEP, SIMPLE or Qualified plan?
__ 11. Do you play online gambling or poker games for money? If so, and if you won a monetary prize, please provide the website for the game as you MAY have a foreign bank account reporting requirement. ________________________

Tax Organizer

Income Information

Wages (W2 tax forms)

	Employer Name	W2 Received
1		
2		
3		
4		
5		
6		

Pensions & IRA's (1099R tax forms)

	Financial Institution Name	1099 Received
1		
2		
3		
4		
5		
6		

Self-Employment Information (1099NEC tax forms)

	Self-Employment #1	Self-Employment #2	Self-Employment #3	Self-Employment #4
Taxpayer				
Spouse				

Interest Income (1099INT tax forms)

	Financial Institution Name	1099 Received
1		
2		
3		
4		
5		
6		

Dividend Income (1099DIV tax forms)

	Financial Institution Name	1099 Received
1		
2		
3		
4		
5		
6		

Income or Loss from Partnerships, S Corporations and Trusts (K1 tax forms)

	Entity Name	K1 Received
1		
2		
3		
4		
5		
6		

Gains or Losses from Sales of Stocks & Securities (1099B tax forms)

	Investment Firm Name	1099B Received
1		
2		
3		
4		
5		
6		

Other Income

	Other Income	Taxpayer	Spouse
1	Taxable refunds of state and local income taxes		
2	Alimony received		
3	Rents and royalties (schedule E)		
4	Farm income or loss (schedule F)		
5	Unemployment compensation		
6	Social security benefits		
7	Unreported tips		
8	Taxable childcare benefits		
9	Gambling/lottery winnings		
10	Prizes and awards		
11	Taxable scholarships and fellowships		
12			
13			
14			

Tax Organizer

	Adjustments to Income	Taxpayer	Spouse
1	Educator expenses		
2	Heath savings account deduction		
3	Moving expenses for members of armed services		
4	Self employed SEP, simple & qualified plans contributions		
5	Alimony paid		
6	IRA contributions		
7	Student loan interest paid		
8	Tuition and fees paid		

	Itemized Deductions (when beneficial to itemize)	Amount
1	Medical & dental expenses (other than long term care premiums)	
2	Long term care premiums Taxpayer	Spouse
3	Medical and moving mileage	
4	Other state and local taxes paid not reported elsewhere in organizer	
5	State and local taxes paid	
6	Real estate taxes	
7	Personal property taxes	
8	Other taxes	
9	Home mortgage interest and points reported on for 1098	
10	Home mortgage interest not reported on 1098 Name: Social security number: Address:	
11	Home mortgage points not reported on form 1098	
12	Qualifies mortgage insurance premiums	
13	Investment interest paid	
14	Gifts to charity by cash or check	
15	Gifts to charity other than by cash or check	
16	Mileage driven for charitable activities	
17	Casualty and theft loss(es) from a federally declared disaster	
18	Unreimbursed employee expenses (state use only)	
	- Travel expenses (exclude meals)	
	- Meals	
	- Parking & tolls	
	- Telephone used for employer's business (allocate cost)	
	- Professional organization or union dues	
	- Educational expenses required to maintain your employment	
	- Office in home required by employer	
	- Tools & equipment	
	- Uniform & protective clothing	
	- Professional journal subscriptions	
	- Job seeking costs	
	- Other	
19	Tax preparation fees (state use only)	
20	Other expenses (state use only)	
	- Investment expenses (state use only)	
	- Safe deposit box rental (state use only)	
21	Gambling losses	

Tax Organizer

Education Expenses

	Student's name	School name	Year of school	1098T received
1				
2				
3				
4				
5				

Child or Dependent Care Expenses

	Persons or organizations who provided the care				
	Name	Address	Dependents name	Tax ID number	Amount paid
1					
2					
3					
4					
5					

	****OBBBA SPECIFIC PROVISIONS****	**Taxpayer**	**Spouse**
1	Did you work overtime in 2025? If so, please include paystubs.		
2	Did you earn tips as part of your pay in 2025?		
3	Did you purchase a brand new vehicle in 2025? If so include bill of sale as well as interest paid for 2025 with tax documents.		
4	Do you own a home and/or second home? If so include taxes and interest paid for 2025 with tax documents for 2025.		
5	Did you have a child in 2025 and if so was your Trump account established for you?		

Attestation and Signature:

To the best of my knowledge the enclosed information is correct and includes all income, deductions and other information necessary for the preparation of this year's income tax returns for which I have adequate records. Should additional documentation be required in order to complete the tax returns I agree to provide those records in a timely manner. I agree to provide payment in full to Smith & Harding Associates at the time of work completion and invoice for services rendered in order to complete the required tax preparation.

If you would like an appointment to review your return or to ask your Tax Professional any questions about your return please go to our website at www.SmithandHarding.com and click on the BOOK link on the homepage and follow the prompts for your specific Tax Professional.

Taxpayer signature: ______________________________ **Date:** ____________________

Spouse signature: ______________________________ **Date:** ____________________

Received by: ______________________________ **Date:** ____________________

Smith & Harding Associates Representative