

2025 Individual Taxpayer Organizer

Sirrom Tax Specialist & Consultant

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Basic Expat Fee: \$350 stripe

Basic US Return (no foreign income): \$200 stripe

***These fees include Federal and single State tax return preparation, e-filing, federal extensions (state upon request) and limited year-round planning and support.

Additional fees

(Please visit [website](#) for more payment options)

Schedule C, E, or F (per form): Varies

Additional State or Local Tax Returns: \$40

Second Overseas Presence Test (Form 2555): \$75

Separate Tax Return Filings (taxpayer/spouse): \$100

Fee to Mail Returns: \$50 (\$15 each additional return)

IRS/State Issues: \$50 per hour

Amendments (previous years): \$300 each year

Name of Taxpayer			SS#		
First	M.I.	Last	Email		
Occupation	Date of birth				
Address	City	State	Zip		
County	Home phone	Work or cell			
Name of Spouse			SS#		
First	M.I.	Last	Email		
Occupation	Date of birth	Are you new to our firm? Yes No			
(Enter information below only if different from Taxpayer)					
Address	City	State	Zip		
County	Home phone	Work or cell			
If you moved during 2025, enter your previous address.			Date of move		
Filing status: <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Jointly <input type="checkbox"/> Married Filing Separately <input type="checkbox"/> Widow(er) <input type="checkbox"/> Head of Household <input type="checkbox"/> Unsure Were you divorced or separated during the year? <input type="checkbox"/> Yes <input type="checkbox"/> No Were there any deaths in the family? <input type="checkbox"/> Yes <input type="checkbox"/> No Have you received any notice from the IRS or state revenue department within the past year? <input type="checkbox"/> Yes <input type="checkbox"/> No Same-sex married couples are required to file as Married Filing Jointly or Married Filing Separately for federal returns, regardless of where the married couple lives. Same-sex married couples may also want to file amended returns for prior tax years.					
Names of dependent children Child's full name	Social Security #	Date of birth	Months lived in home in 2025	Relationship to taxpayer	College student?
Did any of the children have income above \$1,100 for the year? <input type="checkbox"/> Yes <input type="checkbox"/> No Do any of the children have a disability? <input type="checkbox"/> Yes <input type="checkbox"/> No Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2025? <input type="checkbox"/> Yes <input type="checkbox"/> No					
Other dependents or people who lived with you					
Name	Social Security #	Date of birth	Relationship	Income	
If you are due a refund, would you like it directly deposited into your bank account? 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.					

Questions — All Taxpayers

"You" refers to both taxpayer and spouse—enter "?" if unsure about a question.

Yes	No	Did your marital status change during the year?
Yes	No	Where there any changes to dependents?
Yes	No	Did your resident state change during the year?
Yes	No	Did you, your spouse, and your dependents have health insurance for the entire year of 2025? (send 1095-A, B, and/or C)
Yes	No	Did you have any investment income, such as interest, dividends, stock sales, royalties, etc? (provide year-end statements)
Yes	No	Did you have any higher education expenses or pay any student loan interest?
Yes	No	Did you have any debt cancelled or was your home foreclosed?
Yes	No	Did you purchase, refinance or sell your principal home, second home, or rental property? (send closing docs)
Yes	No	Did you own any foreign assets, such as bank accounts, retirement accounts, investments, etc?
Yes	No	Did you make any contributions to a retirement account other than one sponsored by your employer?
Yes	No	Did you have any dependent care expenses?
Yes	No	Did you have any other income, such as income from retirement distributions, self-employment, rental properties, unemployment compensation, alimony, gambling winnings, jury duty pay, or state tax refunds? (provide year-end statements)
Yes	No	Did you have itemizable deductible expenses, such as mortgage interest, property taxes, medical expenses, car tags, or charitable contributions?

**IF YOU ANSWERED "YES" TO ANY OF THE
QUESTIONS ABOVE, IT IS IN YOUR BEST
INTEREST TO COMPLETE A FULL CLIENT TAX
ORGANIZER. YOU CAN DOWNLOAD THE
ORGANIZER AT
sirromtax.com/forms**

Foreign Earned Income Exclusions (Form 2555)

PHYSICAL PRESENCE TEST

BONA FIDE RESIDENT

OVERSEAS INFORMATION FOR TAXPAYER

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

Provide employer information for each number above, respectively in the columns below.

1) Address or APO Address	City	Country	Zip
2) Address or APO Address	City	Country	Zip
3) Address or APO Address	City	Country	Zip
4) Address or APO Address	City	Country	Zip
5) Address or APO Address	City	Country	Zip
6) Address or APO Address	City	Country	Zip

Travel Information – Trips to USA or US Possession or Territory (**send flight itineraries & LOA**)

Please enter all travel for 2025 as well as travel for 2026 known to date and estimated. Use MM/DD/YY format for all dates entered.

First Full Day Overseas (Taxpayer):

First Full Day Overseas (Spouse):

T/S	Date Left Foreign Country	Date Arrived USA	Date Left USA	Date Arrived Foreign Country
1)				
2)				
3)				
4)				
5)				
6)				

List Any Unreimbursed Employee Expenses Related to Foreign Employment

These are the items required by your employer to do your job.

Current Calendar Year Only

Description

Foreign Housing Expense	\$	Safety gear & supplies	\$
Foreign Taxes Paid During 2025	\$	Phone	\$
Storage fees during US absence	\$	Internet	\$
Computer, hardware, software, accessories	\$	Other (list):	\$
Office supplies	\$	Other (list):	\$