



**Dave Canell
Tax Solutions**

2025 Tax Organizer

Individual Tax Organizer

Personal Information

You:

First name	Last name	Social Security Number			
Date of Birth	Occupation				
Phone Number	Email Address				
Marital Status:	Single	Married	Divorced	Legally separated	Widowed

Spouse:

First name	Last name	Social Security Number
Date of Birth	Occupation	
Phone Number	Email Address	

Mailing Address:

Address	City	State	Zip code
Did your address change?	Yes	No	Date changed

Dependents**Dependent 1:**

First name	Last name	Social Security Number			
Date of Birth	Relationship				
Income (if over \$5,200)	Number of Months Resided in Home				
Was a full-time college student?	Yes	No	Did file his/her own return?	Yes	No

Dependent 2:

First name	Last name	Social Security Number			
Date of Birth	Relationship				
Income (if over \$5,200)	Number of Months Resided in Home				
Was a full-time college student?	Yes	No	Did file his/her own return?	Yes	No

Dependent 3:

First name	Last name	Social Security Number			
Date of Birth	Relationship				
Income (if over \$5,200)	Number of Months Resided in Home				
Did file his/her own return?	Yes	No	Was a full-time college student?	Yes	No

Dependent 4:

First name	Last name	Social Security Number			
Date of Birth	Relationship				
Income (if over \$5,200)	Number of Months Resided in Home				
Did file his/her own return?	Yes	No	Was a full-time college student?	Yes	No

Income Sources

Work Income

- Had a Job (W-2)
- Self-Employed (1099-NEC, 1099-MISC, 1099-K)

Investment & Savings

- Brokerage Accounts (1099-B, Brokerage Statement)
- Interest Income (1099-INT)
- Dividend Income (1099-DIV)
- Exercised Incentive Stock Options (Form 3921)
- Sold Real Estate (1099-S)

Less Common Investment & Savings

- Received 1099-OID
- Undistributed Capital Gains (Form 2439)
- Foreign Accounts

Retirement Plans and Social Security

- IRA, 401k, Pension Plan Withdrawals (1099-R)
- Amount transferred to charity - QCD
- Social Security Benefits (SSA-1099)

Rentals, Royalties, and Farm

- Rental Properties & Royalties (1099-MISC)
- Farm Income & Rental

Other Income

- Unemployment & Government Payments (1099-G)
- Received K-1
- HSA/MSA Withdrawal (1099-SA)
- Gambling Winnings (W-2G)
 - Amount not reported on W-2G
- Received Alimony
 - Amount of Alimony
 - Date of Divorce or Separation
- Jury Duty
 - Amount Received
 - Amount Repaid to Employer
- Sold Main Home (gain or loss)
 - Date Purchased
 - Purchase Amount
 - Other Expenses
- Home Foreclosure or Debt Cancellation (1099-A, 1099-C)
- 529 Plan or Coverdell ESA Withdrawal (1099-Q)
- Other

Deductions and Credits

Home

Home Loan Interest (Form 1098)

Property Taxes

Main Home

Additional Homes

Family

Child Care Credit

1. Child's Name Daycare Name

Daycare Provider SSN/EIN Daycare Address

Total Amount Paid

2. Child's Name Daycare Name

Daycare Provider SSN/EIN Daycare Address

Total Amount Paid

3. Child's Name Daycare Name

Daycare Provider SSN/EIN Daycare Address

Total Amount Paid

Adoption Credit

Child's Name Birth Year

SSN, ATIN, or ITIN Adoption Expenses

Does child have special needs? Yes No Is child a U.S. citizen? Yes No

Paid Alimony

Recipient's Name Recipient's SSN

Alimony Amount Date of Divorce/Separation

Charitable Donations

Cash/Check Donations

Total Amount Donated

Non-Cash Donations

1. Organization Name Organization Address

Description Date of Contribution

Donation Value Cost Basis Date Acquired

2. Organization Name Organization Address

Description Date of Contribution

Donation Value Cost Basis Date Acquired

Retirement

Retirement Contributions

Traditional IRA Amount converted to Roth IRA

Roth IRA

SEP

Solo 401(k)

Deductions and Credits (Continued)

Education and Work

College Tuition & Expenses (1098-T)

Cost of Supplies (purchased at school)

Cost of Supplies (purchased elsewhere)

Did you receive financial aid not reported on a 1098-T?

Yes No

Student Loan Interest (1098-E)

Educator Expenses

Amount Spent

Vehicles & Personal Property

Major Purchases

1. Description

Sales Tax Paid

2. Description

Sales Tax Paid

Car Registration Fees

1. Make & Model

Amount

2. Make & Model

Amount

Casualties and Thefts

Description of Event

Date

Property Lost or Damaged

Cost

Energy Efficiency Credits

Home Energy Credits

Exterior Doors

Exterior Windows

Metal/Asphalt Roof

Insulation

Building Property

Furnace Fan

Furnace/Water Boiler

Solar Heating

Wind Energy Property

Heat Pump

Fuel Cell Property

Fuel Cell Capacity

Energy Efficient Vehicles

Make

Model

Year

VIN

Date Purchased

Credit Amount

Energy Efficient Charging Station

Cost

Medical

Contributions to HSA/MSA (Form 5498-SA)

Amount

Medical & Dental Expenses

Medical Professionals

Prescription Drugs

Labs and X-rays

Medical Facilities

Medical Supplies

Glasses & Contacts

Medical & Dental Ins.

LTC Ins. (You)

LTC Ins. (Spouse)

Travel Expenses

No. of Miles Traveled

Other

Affordable Care Act (1095-A)

Self Employment Worksheet

Work Description

Type of Work

Business Name

Income

1099-NEC

1099-MISC

1099-K

Cash and Checks Amount Earned in Cash and Checks

Expenses

Advertising	Commissions and Fees
Business Insurance	Interest - Mortgage
Interest - Other	Legal & Professional Fees
Office Expenses	Rent - Vehicles, Equipment, etc.
Rent - Business Property	Repairs & Maintenance
Supplies	Taxes & Licenses
Business Travel	Business Meals
Utilities	Inventory
Bank Charges	Dues & Subscriptions
Telephone	Miscellaneous

Labor:

Contract Labor Expenses	Did you pay any contractor \$600+?	Yes	No
Did you have any employees?	Yes	No	Wages Paid

Vehicle:

Make & Model	Date Purchased/Leased
Miles Driven (work and personal)	Miles Driven (work only)
Parking & Toll Expenses	Other Vehicle Expenses

Depreciable Assets:

1. Description	Date Purchased	Cost
2. Description	Date Purchased	Cost

Home Office:

Square Footage of Home Office	Square Footage of Entire Home
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Other Expenses:

1. Description	Cost
2. Description	Cost
3. Description	Cost

Rental Property Worksheet

Property #1

Address	City	State	Zip code		
Property Type:	Single family	Multi-family	Vacation or Short-term	Land	Commercial

Rental Income:

Total Rent Received

Expenses:

Real Estate Taxes	Mortgage Interest
Mortgage Insurance	Property Insurance
Supplies	Management Fees
Professional & Legal Fees	Advertising
Commissions	Repairs
Utilities	Cleaning & Maintenance
Other Expense #1	Other Expense #2

Repairs and Improvements:

1. Description	Date	Cost
2. Description	Date	Cost
3. Description	Date	Cost

Property #2

Address	City	State	Zip code		
Property Type:	Single family	Multi-family	Vacation or Short-term	Land	Commercial

Rental Income:

Total Rent Received

Expenses:

Real Estate Taxes	Mortgage Interest
Mortgage Insurance	Property Insurance
Supplies	Management Fees
Professional & Legal Fees	Advertising
Commissions	Repairs
Utilities	Cleaning & Maintenance
Other Expense #1	Other Expense #2

Repairs and Improvements:

1. Description	Date	Cost
2. Description	Date	Cost
3. Description	Date	Cost

Rental Property Worksheet (Continued)

Property #3

Address	City	State	Zip code		
Property Type:	Single family	Multi-family	Vacation or Short-term	Land	Commercial

Rental Income:

Total Rent Received

Expenses:

Real Estate Taxes	Mortgage Interest
Mortgage Insurance	Property Insurance
Supplies	Management Fees
Professional & Legal Fees	Advertising
Commissions	Repairs
Utilities	Cleaning & Maintenance
Other Expense #1	Other Expense #2

Repairs and Improvements:

1. Description	Date	Cost
2. Description	Date	Cost
3. Description	Date	Cost

Property #4

Address	City	State	Zip code		
Property Type:	Single family	Multi-family	Vacation or Short-term	Land	Commercial

Rental Income:

Total Rent Received

Expenses:

Real Estate Taxes	Mortgage Interest
Mortgage Insurance	Property Insurance
Supplies	Management Fees
Professional & Legal Fees	Advertising
Commissions	Repairs
Utilities	Cleaning & Maintenance
Other Expense #1	Other Expense #2

Repairs and Improvements:

1. Description	Date	Cost
2. Description	Date	Cost
3. Description	Date	Cost

Foreign Accounts Worksheet

Account #1:

Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2025)	Date Account Closed (if in 2025)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly?	Yes No

Account #2:

Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2025)	Date Account Closed (if in 2025)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly?	Yes No

Account #3:

Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2025)	Date Account Closed (if in 2025)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly?	Yes No

Account #4:

Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2025)	Date Account Closed (if in 2025)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly?	Yes No

Account #5:

Name of Foreign Bank	Address
Account Type	Account Number
Date Account Opened (if in 2025)	Date Account Closed (if in 2025)
Maximum Value (Include Currency)	End Year Balance (Include Currency)
Is the account owned jointly?	Yes No

Additional Questions

Estimated Taxes Paid:

	Federal Taxes	State Taxes	Local Taxes
1st Quarter (Apr 2025)			
2nd Quarter (Jun 2025)			
3rd Quarter (Sep 2025)			
4th Quarter (Jan 2026)			

Direct Deposit & Electronic Payment:

If you're entitled to a refund, would you like to receive it as a direct deposit? Yes No

Bank Name Account Type

Routing Number Account Number

Notes Relating to Income Received:

Other Questions or Concerns: