

2025	1040	US	Tax Organizer
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Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2025 tax return. Please provide all pertinent 2025 information and documents.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

CLIENT INFORMATION**Taxpayer****Spouse**

First name and initial			
Last name			
Title/suffix			
Social security number			
Occupation			
Date of birth (m/d/y)			
Date of death (m/d/y)			
1=blind			
Home phone			
Work phone			
Work extension			
Cell phone			
E-mail address			
Address	In care of		
	Street address		
	Apartment number		
	City		
	State		
	ZIP code		

DEPENDENTS**Dependent No. 1****Dependent No. 2**

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

Dependent No. 3**Dependent No. 4**

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

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Please enter all pertinent 2025 information. If you have **provided to us** a government form for an item, check the box and do not enter a 2025 amount.

WAGES, SALARIES AND TIPS

Employer name:

<input type="checkbox"/>	

2025

Provide Forms W-2

INTEREST INCOME

Payer name:

<input type="checkbox"/>	

Provide Forms 1099-INT

DIVIDEND INCOME

Payer name:

<input type="checkbox"/>	

Provide Forms 1099-DIV

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

<input type="checkbox"/>	

Provide Forms 1099-R & W-2G

Winnings not reported on W-2G

Total gambling losses

OTHER GOVERNMENT FORMS - INCOME

- Form 1099-B - Sales of stock (also include transaction history)
- Form 1099-MISC - Miscellaneous income
- Form 1099-K - Merchant card and third party network payments
- Form 1099-S - Sales of real estate (also include closing statements)

Provide Forms 1099

- Form 1099-G - State tax refunds

Provide Forms 1099

- Taxpayer: Form SSA-1099 - Social security benefits
- Form 1099-G - Unemployment compensation
- Form 1099-Q (529 Plan)
- Form 1099-QA/5498-QA (ABLE Accounts)

Provide Forms 1099

- Spouse: Form SSA-1099 - Social security benefits
- Form 1099-G - Unemployment compensation
- Form 1099-Q (529 Plan)
- Form 1099-QA/5498-QA (ABLE Accounts)

Provide Forms 1099

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MISCELLANEOUS INCOME

Taxpayer: Alimony received

Spouse: Alimony received

Other:

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer: Traditional IRA contributions (1=maximum)

	2025 Amount

Roth IRA contributions (1=maximum)

Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)

Spouse: Traditional IRA contributions (1=maximum)

Roth IRA contributions (1=maximum)

Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)

OTHER GOVERNMENT FORMS - DEDUCTIONS

- Form 1098-E - Student loan interest
- Form 1098-T - Tuition and related expenses

Provide Forms 1098

AFFORDABLE CARE ACT

- Form 1095-A - Health Insurance Marketplace Statement
- Form 1095-B - Health Coverage
- Form 1095-C - Employer-Provided Health Insurance Offer and Coverage

Provide Forms 1095

ADJUSTMENTS TO INCOME

Taxpayer:

Self-employed health insurance premiums

Educator expenses

Other adjustments to income:

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Spouse:

Self-employed health insurance premiums

Educator expenses

Other adjustments to income:

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MEDICAL AND DENTAL EXPENSES

Prescription medicines and drugs

Doctors, dentists and nurses

Hospitals and nursing homes

Insurance premiums

Long-term care premiums - taxpayer

Long-term care premiums - spouse

Insurance reimbursement

Out-of-pocket lodging and transportation expenses

Number of medical miles

Other:

TAXES PAID

State income taxes - 1/25 payment on 2024 state estimate

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TAXES PAID (continued)

State income taxes - paid with 2024 state extension
 State income taxes - paid with 2024 state return
 State income taxes - paid for prior years and/or to other states
 City/local income taxes - 1/25 payment on 2024 city/local estimate
 City/local income taxes - paid with 2024 city/local extension
 City/local income taxes - paid with 2024 city/local return
 State and local sales taxes (except autos and special items)
 Use taxes paid on 2025 purchases
 Use taxes paid on 2024 state return
 Sales tax on autos not included above
 Sales taxes paid on boats, aircraft, and other special items
 Real estate taxes - principal residence
 Real estate taxes - property held for investment
 Foreign income taxes
 Personal property taxes (including automobile fees in some states)

2025 Amount

	2025 Amount
State income taxes - paid with 2024 state extension	
State income taxes - paid with 2024 state return	
State income taxes - paid for prior years and/or to other states	
City/local income taxes - 1/25 payment on 2024 city/local estimate	
City/local income taxes - paid with 2024 city/local extension	
City/local income taxes - paid with 2024 city/local return	
State and local sales taxes (except autos and special items)	
Use taxes paid on 2025 purchases	
Use taxes paid on 2024 state return	
Sales tax on autos not included above	
Sales taxes paid on boats, aircraft, and other special items	
Real estate taxes - principal residence	
Real estate taxes - property held for investment	
Foreign income taxes	
<input type="checkbox"/> Personal property taxes (including automobile fees in some states)	Provide Tax Notice

INTEREST PAID

Home mortgage interest and points paid:

Provide Forms 1098

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee):

Points not reported on Form 1098:

Mortgage insurance premiums on post 12/31/06 contracts

Investment interest (interest on margin accounts):

Passive interest

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee (receipt), showing the name of the organization, contribution date(s), and contribution amount(s).

Volunteer expenses (out-of-pocket)

Number of charitable miles

NONCASH CONTRIBUTIONS

NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied.

Other: _____
