

# INCOME TAX ORGANIZER – 2024

YES NO

- If you purchased insurance through the exchange you should receive a Form 1095 A, B or C, did you bring this form? Y  N
- Did any births, adoptions, graduations, marriages, divorces, or deaths occur in your family this year?
- Do you have a mentally or physically disabled child?
- Can you or your spouse be claimed as a dependent by someone else?
- Did you have a change in residence or job location during the year?
- Did you receive any correspondence from IRS or State Tax Commission this year? If so, please bring.
- Do you have foreign assets or foreign income in a foreign bank account or a foreign trust? Answer Yes, if you hold Crypto.
- Do you have a business that is either an LLC, S Corporation, Partnership, or C Corporation?
- Have you sold, sent, acquired, or exchanged any virtual Currency?

## INCOME:

- Have you received all W-2's from ALL employers?
- Did you bring every W2 and 1099 that you have received? IRS IS MATCHING THESE TO YOUR RETURN! This includes Social Security Statement.
- Do you own an interest in a Partnership, Corporation, Estate or Trust? Please bring any K1's from these entities.
- Did you receive any interest or dividend income? If so, see Sec C or D, and bring in your 1099's.
- Did you dispose of any assets in 2024? (Real estate, securities, business assets) If yes, please attach details such as brokerage statements and/or closing statements.
- Do you have rental property? If so, see section F. If you have multiple rentals, use section F as a template for your properties.
- Do you have a small business, are you self-employed or did you receive a 1099-MISC for contract labor? See Section G.
- Did you or your spouse "rollover" a profit-sharing or retirement plan into another plan?
- Did you or your spouse receive any lump sum distributions from IRA, Profit Sharing or Pension Plan? Bring 1099's.
- Did you take your first RMD in 2020, 2021, 2022, 2023 or 2024?
- Did you receive any income not shown in this organizer such as gambling income, bartering, etc.?

## EXPENSES AND DEDUCTIONS:

- Did you pay real estate taxes on your residence in 2024? If so, see section J - Taxes.
- Did you incur medical expenses greater than 7.5% of your Income? If so, see section J – Medical
- Did you make a cash or non-cash charitable contribution in excess of \$250? See section J.  
\*If YES, you must have contemporaneous receipts for gifts to claim deduction.
- Did you have any child or dependent care expenses? See section K.
- Did you pay tuition, fees and/or books to a college or university for yourself, spouse or dependent?  
\*Does not include room and board or student activity expense. Please provide details of tuition paid (1098-T & documentation for books & supplies.)
- Do you have any stock or crypto that is worthless this year?
- Did you pay interest in 2024 on a student loan for yourself or dependent?
- Did you use your car for business purposes other than commuting to & from work? See Section G.
- Did you donate any Crypto or Virtual Assets? Report in Section J under non-cash items
- Did you or do you plan to contribute to an IRA for 2024? Can we assist you with this decision? Contributions are due by April 15.
- Did you contribute or take distributions from a Health Savings Account (HSA)?
- Did you give a gift greater than \$18,000 last year?
- Have you done a Cash Out Refinance on your Home? Please enter the amount of the remaining refi mortgage that wasn't used to improve the property.

## OTHER:

- Did you pay any estimated taxes during the year? Complete section H.
- Did you purchase, sell, or REFINANCE your principle home or your second home or make a home equity loan during the year? If so, please bring closing statements and HUD-1 settlement statement.

**A. Wages, Salaries, W-2's** Please bring every W-2 to our office

**B. Retirement Income** 1099 - R, Social Security 1099, IRA Distributions. Please bring every 1099 to our office

**C. Interest Income** 1099's Must be Attached

**D. Dividend Income** 1099's Must be Attached

**E. Stock and Securities Sold or Other Assets** Bring 1099-B from Broker

F. Rental Income By Property		
Attach details for additional properties		
Address:		
Income:		
Expenses:		
Advertising		
Cleaning		
Management Fee		
Insurance		
Repairs		
Supplies		
Taxes		
Interest Expense		
Number of Miles Driven		
HOA Expense		
Other		
Major Improvements List Below: ie: roof, major repairs, a/c, siding, carpets.		
Item	Cost	Date of Purch

G. Self Employed Business Income and Expenses			
Gross Income			
Inventory on hand on Dec 31 at your cost			
Expenses			
Cost of Goods Sold		Dues/Publications	
Advertising		Rent	
Bank Charges		Repairs	
Commissions		Supplies	
Freight		Taxes	
Insurance		Travel	
Interest		Telephone	
Legal/Professional		Utilities	
Office Expense		Wages	
Other		Other	
Did you buy any equipment for your business? If so, please provide a list including description, cost and date of purchase.			
Item Description	Cost	Date of Purchase	
Did you drive your vehicle in your business? Y N			
Please provide total miles driven during the year. _____			
How many of these miles were for business purposes this year? _____			

H. Estimated Taxes Paid			
Date Due	Date Paid	Federal	State
Applied from Prior Years Tax Refund	(Bring in check images)		
First Quarter April 15, 2024		\$	\$
Second Quarter June 17, 2024		\$	\$
Third Quarter September 16, 2024		\$	\$
Fourth Quarter January 15, 2025		\$	\$

J. Itemized Deductions	Amount
Medical (Out of Pocket Expense)	
Medical Insurance	
Long-Term Care Insurance	
Mortgage Interest - Residence	
Mortgage Interest - Other (Not Rental)	
Real Estate Taxes - Residence	
Real Estate Taxes - Other	
Value of Cash Charitable Contributions	
Value of Non Cash Contributions	

K. Child Care	
Name of Provider and EIN/SSN	Amount
Note: Did you Participate in a cafeteria plan where your employer pays dependent care benefits for you?	
<input type="checkbox"/> Yes <input type="checkbox"/> No	