Tax Organizer For 2024 Income Tax Return

Prepared For:		
Prepared By:		

This Tax Organizer can be used to help identify information needed to prepare your 2024 income tax return. Enter your 2024 tax information and if additional space is required, enclose a separate sheet with the details. If available, your prior year information has been included for reference.

Please return this Tax Organizer along with all Forms W-2, 1099, and any other relevant information that will assist in the accurate preparation of your 2024 income tax return.

PERSONAL INFORMATION ORGANIZER

Please complete this Organizer before your appointment.

1. PERSONAL INFORMATION

Name	SSI	N or ITIN	Date of Birth	Date of Death	Occupation	Blind	Disabled
Taxpayer							
Spouse							
Street Address	Apt.	City or tow	'n	State	Zip Code	Count	y
Foreign country	Foreig	n province/s	state		Foreign postal code		
E-mail Address(es)			Home Phor	ne	Mobile Phone		
Spouse's E-mail Address(es)			Spouse's M	lobile Phone			

2. FILING STATUS

Single	Check if parent (or someone else) can claim you as a dependent on their return.
Married Filing Joint	
Married Filing Separate	Check if you lived apart from your spouse for all of 2024.
Head of Household	
Qualifying Widow(er)	Year spouse died:

3. DEPENDENTS

Name	Relationship	Date of Birth	SSN or ITIN	Months Lived	Disabled		Dependent's	
				With You		Student	Gross Income	Expenses Paid

4. REFUND INFORMATION

-			
Bank Account		Bank Account	
Ownership	🗌 Taxpayer 🗌 Spouse 🗌 Joint	Ownership	🗌 Taxpayer 🗌 Spouse 🗌 Joint
Туре	Checking Savings	Туре	Checking Savings
Bank name		Bank name	
Routing number		Routing number	
Account number		Account number	
	e jurisdiction of the United States? Yes		e jurisdiction of the United States?

5. IDENTIFICATION INFORMATION

Taxpayer		Spouse	
Type of ID:	Driver's license State-issued ID No ID	Type of ID:	Driver's license State-issued ID
ID number		ID number	
Location of issuance		Location of issuance	
Issue date		Issue date	
Expiration date		Expiration date	

PERSONAL INFORMATION ORGANIZER

Please complete this Organizer before your appointment.

6. HEALTH CARE I	NFORMATION	
Please indicate where	you received your health insurance from for all	members of your tax household.
Employer	Government-Sponsored Marketplace	Private Exchange (Individual Insurance Company)

7. MISCELLANEOUS PERSONAL INFORMATION QUESTIONS

1. Check the applicable boxes if you wish to contribute \$3 to the Presidential Election campaign fund.	Taxpayer	Spouse
2. Were you a victim of identity theft and have you been contacted by the IRS?	. 🗌 Yes	🗌 No
If Yes, please furnish the 6-digit PIN issued to you by the IRS		
3. Were you (or your spouse if filing jointly) a nonresident alien for any part of 2024?	. 🗌 Yes	🗌 No
4. Have you received any notices or correspondences from the IRS or state in the past 3 tax years?	. 🗌 Yes	🗌 No
5. Do you have any children age 18 or under (or student under age 24) who had unearned income of more		
than \$2,600?	· 🗌 Yes	🗌 No
6. If any of your children are required to file a return, do you elect to report your child's interest and		
dividends on your return?	· 🗌 Yes	🗌 No
7. Did you give a gift of more than \$18,000 to one or more people?	. 🗌 Yes	🗌 No
8. If age 65 or older, do you want to file Form 1040-SR, U.S. Tax Return for Seniors, instead of Form 1040	? 🗌 Yes	🗌 No

8. COMMENTS

INCOME ORGANIZER

Please complete this Organizer before your appointment.

Business, Farm and Rental and Royalty Income or Loss Organizers are on separate pages.

1. WAGE AND SALARY INFORMATION

Attach W-2s:		
Employer Name	Taxpayer	Spouse
Unreported tip income received:		

2. INTEREST AND DIVIDEND INCOME

Attach 1099-INT, 1099-DIV or other stateme	ents				
Payer Name	Taxpayer	Spouse			
	· H	H			
· · · · · · · · · · · · · · · · · · ·	· H	H			
	- 片	H			
	- 님				
	- <u>L</u>				
		Ē			
	· H	H			
	- 🗀				
1					

3. RETIREMENT DISTRIBUTIONS

Attach 1099-R & 5498	Roth	Other		
Payer Name	IRA	IRA	Taxpayer	Spouse
		П	П	П
	Ē	П	П	П
		H	E E	П
		H	E E	E E
	. —			
Attach SSA 1099 or RRB 109	9		Yes	No
Did you receive social secur	ity ben	efits?.	🗖	
	,			
Did you receive railroad retir	rement	benefit	s?	
1				

7. MISCELLANEOUS INCOME QUESTIONS

1. Did you sell your home?
2. Did you earn any foreign income or pay any foreign taxes?
3. Do you have a health savings account (HSA), Archer MSA or Medicare Advantage (MA) MSA?
4. Did you have a financial account in a foreign country (i.e. bank account, securities account, etc.)?
5. Did you have any debt forgiven (i.e. student loans, home mortgage, etc.)?
 6. At any time during 2024, did you: (a) receive (as a reward, award, or compensation) (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

4. SCHEDULE K-1 INCOME (1065, 1120-S AND 1041)

Attach K-1s:		
Payer Name	Taxpayer	Spouse
· · · · · · · · · · · · · · · · · · ·		
	. 🗆	
	_ 🗌	

5. CAPITAL GAINS AND LOSSES

Attach 1099-Bs:		
Payer Name	Taxpayer	Spouse
· 		

6. OTHER INCOME

Description	Amount
State income tax refund	
Alimony received	
Date of original divorce/separation agreement	
Unemployment compensation	
Gambling winnings	
Jury pay	
Hobby income	
Scholarships (grants)	
NOL Carryforward	
Child support	

BUSINESS INCOME AND EXP	ENSES (Sche	dule C)						
BUSINESS INCOME AND EXP	ENSES (Some	uule C)						
Indicate the owner of this busine	ess: 🗌 Tax	cpayer] Spouse	e 🗌 Joir	nt		
Business Name:								
Business product or service:								
Business Address:								
City, State, and Zip Code:		20.40						
Did you start or acquire this busi								
Accounting Method:					er (describe)	r (doo	ariba)	
Method used to value inventory:	Cost		Jwer or o		narket 🗌 Othe	r (des	line)	
Income and Cost of Goods So	old					202	4 Amount	2023 Amount
Gross receipts or sales						202	Amount	2020 Amount
Returns and allowances								
Other income (enclose descrip	otion).							
Inventory at beginning of year								
Purchases less cost of items v								
Cost of labor								
Materials and supplies								
Other costs								
Inventory at end of year								
		1						
Expenses	2024 Amount	2023 /	Amount				2024 Amou	Int 2023 Amount
Advertising					· · · · · · · · · · ·			
					efficient comm			
Contract labor				bldgs c		• • •		
				Other.				
Employee benefits.								
Mortgage interest								
Other interest.								
Legal and professional fees								
Office expenses								
Pension and profit sharing								
Rent - Vehicle, machinery								
Rent - Other								
Repairs and maintenance								
Supplies.								
Taxes and licenses								
Travel								
Meals and entertainment								
Utilities.								
Vehicle Information			Data ala	and in a			Castarb	
Vehicle description	Con		Date pla	icea in s	ervice	Othor		asis
Business miles Actual expenses such as gas,	oil repairs et	nnuuniç ~	Jinnes		Parking fees a	nd toll		
Actual expenses such as gas,	oli, repairs, ett				Faiking lees a		S	
Sales, Purchases, and Dispos	ition of Asset	ts in 20)24 (New (clients encl	ose detailed listing of a	II depreci	able assets)	
Asset description		.0			Purchase price		ate sold	Sales Price
Business Use of Home								
Area used exclusively for busir						_		
Was the home used as a day of			es 🗌	No				
Casualty losses		rance				Rent		
Mortgage interest				nance			of home	
Real estate taxes paid	Utilit	ies and	other e	xpenses		Valu	e of land	
Carryover of unallowed expenses	to 2024	Yes	No	(if yes, ente	er amount)		_	

PROFIT OR LOSS FROM FAR	MING (Schedu	ıle F)						
Indicate the owner of this farm	: Taxpave	er 🗆	Spouse	еП	Joint			
Principal product			00000		•••••			
Accounting Method: Cash								
Did you materially participate i			farm di	irina 20	24? 🗌 Yes	ΠN	0	
Did you materially participate i				20			0	
Income						2024	Amount	2023 Amount
Sales of livestock and other ite								
Cost of livestock and other iter								
Sales of livestock, produce, gr	ains, and other	[·] produc	ts you r	aised.				
Cooperative distributions								
Agricultural program payments	S							
Commodity Credit Corporation	i (CCC) Ioans r	eported	under e	election				
Commodity Credit Corporation	(CCC) loans f	orfeited						
Crop insurance proceeds and	disaster payme	ents rece	eived in	2023.				
Custom hire								
Other income								
Inventory of livestock, produce	e, etc. at beginr	ning of y	/ear (ac	crual m	ethod only)			
Cost of livestock, produce, etc	. purchased du	ring yea	ar (accru	ual meth	nod only)			
Inventory of livestock, produce	e, etc. at end of	year (a	accrual r	method	only)			
	1	i						
Expenses	2024 Amount	2023 A	mount	- ·			2024 Amou	nt 2023 Amount
Chemicals					and plants pure			
Conservation					e and warehou			
Custom hire				Suppli	es purchased .			
Employee benefits								
Feed purchased				Utilitie	S			
Fertilizers and lime.					nary and breedi			
Freight and trucking				Other				
Gasoline, fuel, and oil.								
Insurance								
Mortgage interest								
Other interest.								
Labor hired								
Pension and profit-sharing								
Vehicles and machinery rent								
Other rentals								
Repairs and maintenance								
Vehicle Information		-			· · · ·		O a at a r h	! -
Vehicle description Business miles	Carro	L	ate pla	ced in s	ervice	0/1	Cost or b	
Business miles Actual expenses such as gas,		imuting	miles _			Other	miles	
Actual expenses such as gas,	oii, repairs, etc	; <u> </u>			Parking rees	s and to	ms	
Sales, Purchases, and Dispo	sition of Asse	ets in 20	024					
(New clients, enclose detailed listing of all de								
Asset description	, ,		Date ad	cquired	Purchase pric	e [Date sold	Sales price
				•	•			•

RENTAL AND ROYALTY INCOME	AND EXPENSE	S (Schedule E, p	og 1)			
ndicate the owner of this property:	Taxpayer	Spouse	e 🗌 .	Joint		
Description of property						
Location of property						
Did you or your family use this prop	erty during the ta	ax year for perso	nal purposes	for mo	ore	
than the greater of: (a) 14 days,	or (b) 10% of the	e total days rente	ed at fair mar	ket val	ue? 🗌 Ye	s 🗌 No
Did you meet the Active Participation (To meet these requirements, you must have	e participated in makir	ng management decis	sions or arranged		🗌 Ye	s 🗌 No
others to provide services in a significant and new tenants, deciding on rental terms, appro	d bona fide sense. Si wing repair expenditu	uch management dec res, or other similar d	isions include ap ecisions)	oroving		
Was this property fully disposed of a	during 2024?				Ye:	s 🗌 No
ncome				20	024 Amount	2023 Amount
Rents received						2023 Amount
Royalties received						
				•		
Expenses				20	024 Amount	2023 Amount
Advertising					J24 Amount	2023 Amount
Cleaning and maintenance						
Commissions				·		
Legal and other professional fees						
Management fees						
Mortgage interest paid to banks						
Other interest						
Repairs.						
Supplies						
Taxes.						
Utilities				•		
Other						
Amortization.						
Section 481(a) adjustment		<u></u>				
/ehicle Information						
Vehicle description		Date placed in s	ervice		Cost or ba	asis
Vehicle description Business miles Actual expenses such as gas, oil,	Commuting r	miles		Other I	miles	
Actual expenses such as gas, oil,	repairs, etc		Parking fe	es and	d tolls	
Travel expenses						
Sales, Purchases, and Disposition New clients, enclose detailed listing of all depreciable)24		_		
Asset description		Date acquired	Purchase p	rice	Date sold	Sales price
			<u> </u>			
		ļ	ļ			ļ

Income from the production of livestock, produce, grains, and other crops	ARM RENTAL INCOME AND I	EXPENSES (Form 4835)						
Did you actively participate in the operation of this farm rental during 2024? Yes No Income from the production of livestock, produce, grains, and other crops 2024 Amount 2023 Ai Total cooperative distributions	ndicate the owner of this farm re	ental:] Taxpayer	Sp	ouse	🗌 Joir	nt		
Did you actively participate in the operation of this farm rental during 2024? Yes No Income from the production of livestock, produce, grains, and other crops 2024 Amount 2023 Ai Total cooperative distributions	Property description:								
Income from the production of livestock, produce, grains, and other crops		e operation of	this farm renta	l during	2024?	Yes	🗌 No		
Income from the production of livestock, produce, grains, and other crops									
Total cooperative distributions Agricultural program payments Agricultural program payments							Amount	2023	Amount
Agricultural program payments									
Commodity Credit Corporation (CCC) loans forfeited									
Commodity Credit Corporation (CCC) loans forfeited									
Crop insurance proceeds and federal crop disaster payments received in 2023									
Expenses 2024 Amount 2023 Amount Seeds and plants purchased 2024 Amount 2023 Chemicals									
Chemicals	Other income	-							
Chemicals				1					
Conservation		2024 Amount	2023 Amount		and plants pur	chacad		nt 202	3 Amount
Custom hire								_	
Employee benefits				Suppli	e and warenou	sing			
Feed purchased									
Fertilizers and lime									
Freight and trucking Other Other Image: Constraint of the state of the s	Fertilizers and lime								
Gasoline, fuel, and oil									
Insurance	Gasoline, fuel, and oil								
Mortgage interest.									
Other interest									
Labor hired									
Vehicles and machinery rent Amortization. Image: Constraint of the sector of the	Labor hired								
Other rentals 263A Preproductive exp.									
Repairs and maintenance Sec. 481(a) exp. Vehicle Information Date placed in service Cost or basis Vehicle description Date placed in service Cost or basis Business miles Commuting miles Other miles Actual expenses such as gas, oil, repairs, etc Parking fees and tolls Sales, Purchases, and Disposition of Assets in 2024 (New clients, enclose detailed listing of all depreciable assets.)	Vehicles and machinery rent								
Vehicle Information Vehicle description Date placed in service Business miles Commuting miles Actual expenses such as gas, oil, repairs, etc Parking fees and tolls Sales, Purchases, and Disposition of Assets in 2024 (New clients, enclose detailed listing of all depreciable assets.)	Other rentals								
Vehicle description Date placed in service Cost or basis Business miles Commuting miles Other miles Actual expenses such as gas, oil, repairs, etc Parking fees and tolls Sales, Purchases, and Disposition of Assets in 2024 (New clients, enclose detailed listing of all depreciable assets.)	Repairs and maintenance.			Sec. 4	81(a) exp				
Business miles Commuting miles Other miles Actual expenses such as gas, oil, repairs, etc Parking fees and tolls Sales, Purchases, and Disposition of Assets in 2024 (New clients, enclose detailed listing of all depreciable assets.) Sales, Purchases, and Disposition of Assets in 2024	ehicle Information								
Business miles Commuting miles Other miles Actual expenses such as gas, oil, repairs, etc Parking fees and tolls Sales, Purchases, and Disposition of Assets in 2024 (New clients, enclose detailed listing of all depreciable assets.)	Vehicle description		Date plac	ed in sei	rvice		Cost or ba	sis	
Actual expenses such as gas, oil, repairs, etc Parking fees and tolls Sales, Purchases, and Disposition of Assets in 2024 (New clients, enclose detailed listing of all depreciable assets.)	Business miles	Com	muting miles		(Other m	iles		
(New clients, enclose detailed listing of all depreciable assets.)	Actual expenses such as gas, o	oil, repairs, etc			Parking fees	and toll	s		
(New clients, enclose detailed listing of all depreciable assets.)									
			s in 2024						
		,	Date a	cquired	Purchase pric	ce D	ate sold	Sale	s price
Image: Sector of the sector									
Image: second									
						_			
						_			

DEDUCTIONS ORGANIZER Please complete this Organizer before your appointment. Itemized Deduction Organizers are on separate pages.

1. EDUCATION							
Attach 1098-Ts, 1098-E's a	ind 1099-Q's:					Student Loan	Books, Supplies
Student Name	Educational Institution	Fr \$		r Sr Oth	Tuition & Fees		& Equipment 529 Plan
2. JOB-RELATED MO							LJ
2. JOB-RELATED MO	VING EXPENSES			4. (
Description	Amour	nt		Desc	ription		Amount
					-		
					te of original divorce/sep	aration	
				Heal	th Savings Acco	unt contribution	S
	our new workplace						tributions
-	d workplace					-	
	ces?			-			
							s Plan
					fied business net (lo		
3. IRA CONTRIBUTIO	NS				,		s) carryover
				Quai			
Description	Amour	nt					
	nal IRA						
Contributions to a ROTH I	RA						
	DEDUCTION QUESTIONS						
5. MISCELLANEOUS	DEDUCTION QUESTIONS						
1 Did you purchase an iter	m(s) during 2024 for which you	naid a la	arde	amount	of sales tax?		Yes No
		paid d i	aigo	amount			
2. Did you refinance a mor	tgage during 2024?						Yes No

ledical and Dental Ex	penses (not including r	eimbursements)		2	024	2023
				Am	ount	Amount
Medical/dental care ins						
Medicare B and D pren Qualified long-term car						
Doctor, dentist, and ho						
Prescription medicines						
Medical aids such as e						
Total transportation ex						
Other medical and den	tal expenses		· · · · · · · · · · · L			
axes Paid				2	024	2023
					ount	Amount
State and local income						
Actual state and local						
State and local real estat						
Personal state/local prop	erty taxes (list type of ta	ix paid)				
nterest Paid				2	024	2023
				Am	ount	Amount
Home mortgage intere						
00	st paid to individual.					
Individual's name	st paid to individual.		·····			
Individual's name Individual's address	st paid to individual		· · · · · · · · · · · · · · · · · · ·			
Individual's name Individual's address Individual's ID number	·					
Individual's name Individual's address	urance premiums (VA	A, FHA, RHS, or p				
Individual's name Individual's address Individual's ID number Qualified mortgage ins	urance premiums (VA	A, FHA, RHS, or p				
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex	urance premiums (VA	A, FHA, RHS, or p				
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex	urance premiums (VA pense	A, FHA, RHS, or p	rivate)	tions		
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense onal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex	urance premiums (VA pense	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense onal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
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Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense onal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense onal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense onal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense onal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense ponal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense ponal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense ponal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense ponal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Gifts to Charity (If additi Contributions of cash of	urance premiums (VA pense ponal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Gifts to Charity (If additi Contributions of cash of	urance premiums (VA pense ponal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV
Individual's name Individual's address Individual's ID number Qualified mortgage ins Investment interest ex Sifts to Charity (If additi Contributions of cash of	urance premiums (VA pense ponal lines are needed, attach	A, FHA, RHS, or p	rivate)		Date give	n FMV

Enclose supporting documentation of what is written (If additional losses were incurred, please attach a		imbursen	ent, receipts for cost	of repairs.	—	
Location of property:				Residential property	Business property	
Description of property:				Federal Disaster		
Date of loss:				FEMA disaster decla	aration #	
Amount of damage	Cost basis of prop	perty		Repair Costs		
Insurance reimbursement	FMV of property be	fore los	3	- Other		
Federal monies received		Other				
Unreimbursed Employee Business Exp (if any depreciable assets were sold (including the vehicle), plues (related to job)	lease see worksheet below		Information			
Subscriptions related to your work		Vehicle	e description			
Licenses and regulatory fees		Date p	aced in service			
Tools and supplies used in your work		Cost o	· basis _			
			-			
Medical exams required by your employer		Miles	of vehicle			
Work related education (books, tuition)		Bus	iness miles			
Legal fees related to your job		Cor	nmuting miles	_		
Job search expenses (current occupation)		Oth	er miles			
*In home office:			-			
Total square footage		Expe	nses			
Office square footage		-	ual expenses			
Office square rootage		(ga	as, oil, repairs, etc)			
Pont	ling face and tall					
		Par	king rees and toil	S		
Rent		Par Tra	vel expenses	s		
Utilities		Par Tra	vel expenses	s		
Utilities		Tra	vel expenses	s		
Utilities		Tra	vel expenses	S	_	
Insurance Insurance Utilities Insurance Repairs/Maintenance Insurance *Questions relating to mortgage interest, taxes,	, and casualty losses we	Tra	vel expenses	S	_	
Utilities	, and casualty losses we	Tra	vel expenses	S		
Utilities	, and casualty losses we ssets in 2024	Tra	vel expenses		 Sales price	
Utilities Repairs/Maintenance *Questions relating to mortgage interest, taxes, Sales, Purchases, and Disposition of As (New clients, enclose detailed listing of all depreciable assets	, and casualty losses we ssets in 2024	Tra	vel expenses		_	
Utilities Repairs/Maintenance *Questions relating to mortgage interest, taxes, Sales, Purchases, and Disposition of As (New clients, enclose detailed listing of all depreciable assets	, and casualty losses we ssets in 2024	Tra	vel expenses		_	
Utilities Repairs/Maintenance *Questions relating to mortgage interest, taxes, Sales, Purchases, and Disposition of As (New clients, enclose detailed listing of all depreciable assets	, and casualty losses we ssets in 2024	Tra	vel expenses		_	
Utilities Repairs/Maintenance *Questions relating to mortgage interest, taxes, Sales, Purchases, and Disposition of As (New clients, enclose detailed listing of all depreciable assets	, and casualty losses we ssets in 2024	Tra	vel expenses		_	
Utilities Repairs/Maintenance *Questions relating to mortgage interest, taxes, Sales, Purchases, and Disposition of As (New clients, enclose detailed listing of all depreciable assets	, and casualty losses we ssets in 2024	Tra	vel expenses		_	
Sales, Purchases, and Disposition of As (New clients, enclose detailed listing of all depreciable assets S Asset description	, and casualty losses we ssets in 2024	Tra ere asked quired	vel expenses	Date sold	_	
Utilities Repairs/Maintenance *Questions relating to mortgage interest, taxes, Sales, Purchases, and Disposition of As (New clients, enclose detailed listing of all depreciable assets	, and casualty losses we ssets in 2024	Tra ere asked quired	vel expenses	Date sold	_	
Sales, Purchases, and Disposition of As (New clients, enclose detailed listing of all depreciable assets S Asset description	, and casualty losses we ssets in 2024	Tra ere asked quired Othe	vel expenses <i>previously</i> Purchase price r Misc. Deductio	Date sold	Sales price	
Insurance	, and casualty losses we ssets in 2024	Tra ere asked quired Othe Gam	vel expenses	Date sold	Sales price	
Insurance	, and casualty losses we ssets in 2024	Tra ere asked quired Gam Estat	vel expenses previously Purchase price r Misc. Deduction pling losses	Date sold	Sales price	
Insurance	ssets in 2024	Tra ere asked quired Gam Estat Portfo	Purchase price Purchase price r Misc. Deduction tax deduction (biling losses)	Date sold	ent)	
Insurance	and casualty losses we	Quired Quired Othe Gam Estat Portfu Unrec	Purchase price Purchase price r Misc. Deduction take tax deduction (blio from Schedu overed investment	Date sold	ent)	
Insurance	and casualty losses we	Quired Quired Othe Gam Estat Portfo Unrec Amor	Purchase price Purchase price r Misc. Deduction take tax deduction (blio from Schedu overed investment	Date sold	ent)	
Insurance	and casualty losses we	Quired Quired Othe Gam Estat Portfo Unrec Amor	Purchase price Purchase price r Misc. Deduction time tax deduction (blio from Schedu overed investment tizable premium or ed persons work expendence	Date sold	ent)	
Insurance	and casualty losses we	quired quired Gam Estat Portfo Unrec Amori Disable	Purchase price Purchase price Misc. Deduction Purchase s Purchase price P	Date sold	ent)	

CREDITS AND PAYMENTS ORGANIZER

Please complete this Organizer before your appointment.

1. CHILD CARE CREDIT				
Attach Daycare Provider Statement(s): Care Provider Name Address	Tax-Exempt	Telephone Number	Identification Number	Amount Paid
2. RESIDENTIAL ENERGY CREDIT				
Solar electric property	Exterior windows Electric heat pum Natural gas, prop Biomass fuel stor Natural gas, prop Advanced main a	and skylights ap or central ai pane or oil wate ve pane or oil furn air circulating f	r conditioner er heater ace an	
3. MISCELLANEOUS CREDIT QUESTIONS				
 Did you pay any expenses related to the adoption of an eligible child Are you currently repaying the First-Time Homebuyer Credit? Do you (and your spouse) have a social security number that allows Were you issued a Mortgage Credit Certificate (MCC) by a state or based on the security of the securi	s you to work and is	valid?		. Yes No
4. ESTIMATED TAX PAYMENTS				
Federal estimated payments Applied from 2023 federal refund 1st quarter payment 2nd quarter payment 3rd quarter payment 4th quarter payment	· · · · · · · · · · · · · · · · · · ·	· · · · ·		Amount Paid
Applied from 2023 state refund	Local estimated pay Applied from 2023 1st quarter paymen 2nd quarter paymen 3rd quarter paymen 4th quarter paymen Locality Name	ocal refund t nt t t		