



2024 TAX ORGANIZER – New Clients

Client Name: _____

Spouse Name: _____

Phone/Cell No.: _____ Can we text you? Yes or No

E-mail address: _____

Occupation: _____ Spouse's Occupation: _____

Who referred you to us or how did you hear about us? _____

Did you move or did your address change at all during the year 2024?

Yes – Current address: _____ Date moved: _____

If this was a home sale, provide the settlement statement from the closing

No

Did you have any changes, questions or notes for your 2024? (Did you get married, divorced, new dependent, dependent that graduated/college, withdrew money from retirement, lottery winnings, sold stock, sale of real estate, etc.?) Any other item that could need our attention:

RETURN RESULT OPTIONS:

If you receive a **REFUND**, do you want the money directly deposited into your bank account? **(Provide a copy of a void check or complete the banking info – NO DEBIT CARD info)**

Yes - Routing # _____

Account # _____

Bank Name: _____

Is this a checking account or a savings account? _____

No

If you **OWE** taxes, would you like to have the payment paid electronically?

Yes - E-file date -OR- Other/due Date: _____

No

Did you make any estimated tax payments (other than through a W-2)?

Yes Federal - How much?: _____

State – How much? _____

City/Rita – How much? _____

No

Please provide your driver's license(s) & a prior year's tax return so we may verify any effects on current year and make copies for your records.

TAX QUESTIONNAIRE:

Did you, your spouse, your children, or any of your dependents use the Affordable Care Act (aka Marketplace aka Obamacare) for health insurance coverage through the year?

- Yes---Upload or drop off form 1095-A
- No

Did you receive any unemployment compensation?

- Yes Please provide form 1099-G (You may need to download one online)
- No

Did you contribute to a Health Savings Account (HSA)?

- Yes Is the contribution reflected on your W-2 OR did you make it yourself?
_____ (Need Form 5498-SA if self-contribution)
- No

Did you make a withdrawal from a Health Savings Account (HSA)?

- Yes— Did you received Form 1099-SA?
If Yes, was the entire amount used for qualified medical purposes? _____
- No

At any time during 2024, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (Bitcoin, etc.)?

- Yes—Please provide all related transactions
- No

Do you contribute to any kind of IRA? No Yes – Provide Tax Form 5498

Do you have any investments in a mutual fund, such that you can buy and sell stocks, receive dividends, etc.?

- Yes—Please provide your “Tax Statement” for the account (i.e. 1099-B or 1099-DIV)
- No

Have you ever been denied a credit or filing status by the IRS before?

- No
- Yes – Please explain: _____

****Do you have any other questions and/or situations that need to be addressed?**

DEPENDENTS ORGANIZER

Names of Dependent Children (Legal First & Last name)	Relation to you?	Social Security Number?	Birthdate?	Months lived in home?	College? Yes/No

Other dependents or people that lived with you

Legal Name (First & Last)	Relation to you?	Social Security Number?	Birthdate?	How much is this person's total income for the year?

Are any dependents subject to divorce rules or under a specific claim situation per a court decision? *Unless chosen otherwise by a court, only the parent that both has the child live with them and supported financially over half the year can claim the dependent child.*

- No
- Yes – Please explain: _____

Did you provide over half of the financial support for the year for all of the dependents listed in the tables above?

- Yes
- No/Unsure – Please explain: _____

Do you have documentation to prove the dependency relationship(s) in the event of an audit?

- Yes
- No
- Unsure

Documents to bring with your other tax papers for EACH dependent:

- Social Security Card
- Birth Certificate (for dependent children)
- **For college students**, proof of enrollment via **Form 1098-T**
 - They will likely find this on an online portal through the school rather than mail
 - If applying for education credits, please provide list of education expenses