

2024 TAX ORGANIZER

Client(s) Name: _____

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

E-mail address: _____

Occupation: _____ Spouse's Occupation: _____

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

Yes – New address: _____ Date moved: _____

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.?)

RETURN RESULT OPTIONS:

If you receive a **REFUND**, do you want the money directly deposited into your bank account?
(Provide a copy of your 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 Deferred 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

Did you (or your spouse's) Driver's License expire or get renewed last year?

- Yes Provide renewed license so we can make a copy
- No

TAX QUESTIONNAIRE:

Did you, your spouse, or any of your dependents have health insurance coverage thru the Affordable Care Act (ACA aka Marketplace aka Obamacare)?

- 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 the year, 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

ENERGY EFFICIENT PROPERTY CREDITS:

Did you install any sort of energy efficient property on your residence like windows or a door?
Did you install any solar panels or other similar alternative energy sources?
What about a brand-new electric vehicle?

If yes to any of these questions, please provide a copy of the invoice you paid to purchase or install the item. We may need to get further info from you depending on the purchase. Please give a few details on what you bought below:

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