

2024 Individual Tax Organizer

Personal Information

Taxpayer:

Name	SSN				
Date of Birth	Occupation				
Phone No.	Email				
ID No.	ID State	Issue Date	Exp. Date		
Blind or disabled	Full-time student	On active duty	Dependent of other		
Marital Status:	Single	Married	Divorced	Legally separated	Widowed

Spouse:

Name	SSN		
Date of Birth	Occupation		
Phone No.	Email		
ID No.	ID State	Issue Date	Exp. Date
Blind or disabled	Full-time student	On active duty	Dependent of other

Mailing Address:

Addr.	City	State	Country	Zip
Moved in 2024?	Yes	No	Date moved	Military related

Dependents

Dependent 1:

Name	SSN		
Date of Birth	Relationship		
Income (earned)	Income (unearned)	No. of months in home	
Received <50% support	Filed their own return	Full-time col. student	Disabled

Dependent 2:

Name	SSN		
Date of Birth	Relationship		
Income (earned)	Income (unearned)	No. of months in home	
Received <50% support	Filed their own return	Full-time col. student	Disabled

Dependent 3:

Name	SSN		
Date of Birth	Relationship		
Income (earned)	Income (unearned)	No. of months in home	
Received <50% support	Filed their own return	Full-time col. student	Disabled

Dependent 4:

Name	SSN		
Date of Birth	Relationship		
Income (earned)	Income (unearned)	No. of months in home	
Received <50% support	Filed their own return	Full-time col. student	Disabled

Income Sources

Work Income

Job Income (W-2)

Self-Employment (Self-Employment Worksheet)

Investment & Savings

Brokerage Accounts (1099-B, Consolidated-1099, Brokerage Statement)

Used savings bonds for higher education? Yes No

Interest Income (1099-INT)

Dividend Income (1099-DIV)

Exercised Incentive Stock Options (Form 3921)

Sold Investment Real Estate (1099-S, Closing Statement)

Less Common Investment & Savings

Foreign Accounts & Income (Foreign Accounts Worksheet)

Received 1099-OID

Undistributed Capital Gains (Form 2439)

Retirement Plans and Social Security

IRA, 401k, Pension Plan Withdrawals (1099-R)

Amount transferred to charity - QCD Penalty-free? (age < 59.5) Yes No

Social Security Benefits (SSA-1099, RRB-1099)

Rentals, Royalties, and Farm

Rental Properties & Royalties (Rental Property Worksheet)

Farm Income & Rental (Farm Worksheet)

Other Income

Unemployment & Government Payments (1099-G)

Received K-1

HSA/MSA Withdrawal (1099-SA)

Went towards medical expenses only? Yes No

Gambling Winnings (W-2G)

Winnings not on W-2G Gambling losses

Received Alimony

Recipient Amount received Date divorced

Jury Duty

Amount Received Amount Repaid to Employer

Sold Main Home (1099-S, Closing Statement)

Orig. Purchase Date Orig. Purchase Amount

Selling costs not on closing stmt Improvement & repair costs

Home Foreclosure or Debt Cancellation (1099-A, 1099-C)

529 Plan or Coverdell ESA Withdrawal (1099-Q)

Went towards qualified education expenses only? Yes No

Other

Deductions and Credits

Home

Home Loan Interest (1098)

Property Taxes (Property Tax Statement)

Main home

Add'l homes

Family

Child Care Credit

1. Child name

Provider name

Provider SSN/EIN

Addr.

Amount paid

Child had add'l providers?

Yes

No

2. Child name

Provider name

Provider SSN/EIN

Addr.

Amount paid

Child had add'l providers?

Yes

No

3. Child name

Provider name

Provider SSN/EIN

Addr.

Amount paid

Child had add'l providers?

Yes

No

4. Child name

Provider name

Provider SSN/EIN

Addr.

Amount paid

Child had add'l providers?

Yes

No

Adoption Credit

Child name

SSN, ATIN, ITIN

Birth year

Adoption expenses

Has special needs

U.S. citizen

Paid Alimony

Recipient name

Recipient SSN

Alimony amount

Date divorced/separated

Charitable Donations

Cash & Check Donations

Total amount donated

Non-Cash Donations

1. Org. name

Addr.

Descr.

Date of contribution

Value

Cost basis

Date acquired

2. Org. name

Addr.

Descr.

Date of contribution

Value

Cost basis

Date acquired

Retirement

Retirement Contributions

Traditional IRA - Taxpayer

Spouse

Converted to Roth IRA - Taxpayer

Spouse

Roth IRA - Taxpayer

Spouse

SEP - Taxpayer

Spouse

Solo 401k - Taxpayer

Spouse

Deductions and Credits (Continued)

Education and Work

College Tuition & Expenses (1098-T)		
Supplies purchased at school	Supplies purchased elsewhere	
Received financial aid not reported on a 1098-T?	Yes	No
Student Loan Interest (1098-E)		
529 Plan or Coverdell ESA Contribution		
529 Plan Contribution	Coverdell ESA Contribution	
Educator Expenses		
Amount Spent - Taxpayer	Spouse	

Vehicles & Personal Property

Major Purchases		
1. Descr.	Sales tax	
2. Descr.	Sales tax	
Car Registration Fees		
1. Make & model	Amount	
2. Make & model	Amount	
3. Make & model	Amount	
4. Make & model	Amount	
Personal Property Taxes		
Amount paid		
Casualties and Thefts		
Event descr.	Date	
Property lost/damaged	Cost	

Energy Efficiency Credits

Home Energy Credits		
Exterior Doors	Exterior Windows	Metal/Asphalt Roof
Insulation	Building Property	Furnace Fan
Furnace/Water Boiler	Solar Heating	Wind Energy Property
Heat Pump	Fuel Cell Property	Fuel Cell Capacity
Clean Vehicles (Vehicle Seller Report)		
Vehicle Charging Station		
Cost		

Medical

Contributions to HSA/MSA (Form 5498-SA)		
Amount - Taxpayer	Spouse	
Medical & Dental Expenses		
Medical Professionals	Prescription Drugs	Labs and X-rays
Medical Facilities	Medical Supplies	Glasses & Contacts
Medical & Dental Ins.	LTC Ins. (taxpayer)	LTC Ins. (spouse)
Travel Expenses	No. of Miles Traveled	Other
Affordable Care Act (1095-A)		

Self Employment Worksheet

Business #1

Type of work	Business name	Didn't materially participate
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Income

Uses bookkeeping software	Put income & expenses in a doc	Sold business in 2024
Forms received by taxpayer:	1099-NEC	1099-MISC 1099-K
Total revenue	Refunds and credits	

Cost of Goods Sold:

Cost of product purchases	Cost of labor
Cost of raw materials & supplies	Other costs
Inventory value beg. of year	Inventory value end of year

Expenses

Advertising	Rent - other property
Commissions and fees	Repairs & maint.
Insurance (other than health)	Supplies
Interest - mortgage	Taxes and licenses
Interest - other	Travel
Legal & professional fees	Meals
Office expenses	Utilities
Rent - vehicles, equip., etc.	Self-emp. medical premiums

Labor:

Contract labor	Issued 1099's	Had salaried W-2 employees
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Vehicle:

Make & model	Date placed in service	
Miles (bus.)	Miles (comm.)	Miles (personal)
Gas	Repairs	Insurance
Licenses	Parking and tolls	Other expenses

Home Office:

Sq ft (home office)	Sq ft (entire home)	
Mortgage int.	Prop. taxes	Insurance
Rent	Rep. & maint.	Utilities

Other Expenses:

1. Descr.	Cost
2. Descr.	Cost
3. Descr.	Cost
4. Descr.	Cost

Purchased depr. assets (details attached)	Sold or disposed of depr. assets (details attached)
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Self Employment Worksheet (Continued)

Business #2

Type of work	Business name	Didn't materially participate
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Income

Uses bookkeeping software	Put income & expenses in a doc	Sold business in 2024
Forms received by taxpayer:	1099-NEC	1099-MISC 1099-K
Total revenue	Refunds and credits	

Cost of Goods Sold:

Cost of product purchases	Cost of labor
Cost of raw materials & supplies	Other costs
Inventory value beg. of year	Inventory value end of year

Expenses

Advertising	Rent - other property
Commissions and fees	Repairs & maint.
Insurance (other than health)	Supplies
Interest - mortgage	Taxes and licenses
Interest - other	Travel
Legal & professional fees	Meals
Office expenses	Utilities
Rent - vehicles, equip., etc.	

Labor:

Contract labor	Issued 1099's	Had salaried W-2 employees
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Vehicle:

Make & model	Date placed in service	
Miles (bus.)	Miles (comm.)	Miles (personal)
Gas	Repairs	Insurance
Licenses	Parking and tolls	Other expenses

Home Office:

Sq ft (home office)	Sq ft (entire home)	
Mortgage int.	Prop. taxes	Insurance
Rent	Rep. & maint.	Utilities

Other Expenses:

1. Descr.	Cost
2. Descr.	Cost
3. Descr.	Cost
4. Descr.	Cost

Purchased depr. assets (details attached)	Sold or disposed of depr. assets (details attached)
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Rental Property Worksheet

Property #1

Description						
Property Type:	Single family	Multi-family	Short-term	Land	Commercial	Royalties
Addr.	City		State		Country	Zip
Fair rental days	Personal use days		Purchased in 2024		Sold in 2024	

Rental & Royalty Income:

Income	Has P&L or online bookkeeping	Received 1099-MISC
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Expenses:

Advertising	Interest - mortgage
Cleaning & maintenance	Interest - other
Commissions	Repairs
Insurance	Supplies
Legal & professional fees	Taxes
Management fees	Utilities

Other Expenses:

1. Descr.	Cost
2. Descr.	Cost

Made repairs or improvements (details attached)	Sold or disposed of depr. assets (details attached)
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Property #2

Description						
Property Type:	Single family	Multi-family	Short-term	Land	Commercial	Royalties
Addr.	City		State		Country	Zip
Fair rental days	Personal use days		Purchased in 2024		Sold in 2024	

Rental & Royalty Income:

Income	Has P&L or online bookkeeping	Received 1099-MISC
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Expenses:

Advertising	Interest - mortgage
Cleaning & maintenance	Interest - other
Commissions	Repairs
Insurance	Supplies
Legal & professional fees	Taxes
Management fees	Utilities

Other Expenses:

1. Descr.	Cost
2. Descr.	Cost

Made repairs or improvements (details attached)	Sold or disposed of depr. assets (details attached)
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Rental Property Worksheet (Continued)

Property #3

Description						
Property Type:	Single family	Multi-family	Short-term	Land	Commercial	Royalties
Addr.	City		State		Country	Zip
Fair rental days	Personal use days		Purchased in 2024		Sold in 2024	

Rental & Royalty Income:

Income	Has P&L or online bookkeeping	Received 1099-MISC
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Expenses:

Advertising	Interest - mortgage
Cleaning & maintenance	Interest - other
Commissions	Repairs
Insurance	Supplies
Legal & professional fees	Taxes
Management fees	Utilities

Other Expenses:

1. Descr.	Cost
2. Descr.	Cost

Made repairs or improvements (details attached)

Sold or disposed of depr. assets (details attached)

Property #4

Description						
Property Type:	Single family	Multi-family	Short-term	Land	Commercial	Royalties
Addr.	City		State		Country	Zip
Fair rental days	Personal use days		Purchased in 2024		Sold in 2024	

Rental & Royalty Income:

Income	Has P&L or online bookkeeping	Received 1099-MISC
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Expenses:

Advertising	Interest - mortgage
Cleaning & maintenance	Interest - other
Commissions	Repairs
Insurance	Supplies
Legal & professional fees	Taxes
Management fees	Utilities

1. Descr.

Cost

2. Descr.

Cost

Made repairs or improvements (details attached)

Sold or disposed of depr. assets (details attached)

Farm Worksheet

General Information

Farm Name			Principal Product		
Earned rental income for farm?	Yes	No	Participated in operation of farm?	Yes	No

Farm Income & Rental Income

Uses online bookkeeping software	Listed income & expenses on a document				
Forms received by taxpayer:	1099-G	1099-NEC	1099-MISC	1099-K	1099-PATR
Purchased livestock and other items for resale					
Total sales	Cost or other basis				
Raised livestock, produce, grains, and other products					
Total sales					
Cooperative distributions (1099-PATR)					
Total income	Taxable income				
Agricultural program payments (1099-G)					
Total payments	Taxable amount				
Commodity Credit Corporation (CCC) loans					
CCC loans reported under election					
CCC loans forfeited	Taxable amount				
Crop insurance proceeds					
Amount received	Taxable amount				
Custom hire (machine work)					
Total income					
Other income					
Description	Total income				

Farm Expenses

Car and truck expenses	Labor hired
Chemicals	Pension and profit-sharing plans
Conservation expenses	Rent - vehicles, equip., etc.
Custom hire (machine work)	Rent - other (land, animals, etc.)
Employee benefit programs	Repairs & maintenance
Feed purchased	Seeds and plants purchased
Fertilizers and lime	Storage and warehousing
Freight and trucking	Supplies purchased
Gasoline, fuel, and oil	Taxes
Insurance (other than health)	Utilities
Interest - mortgage	Veterinary, breeding & medicine
Interest - other	

Other Expenses:

1. Descr.	Amount
2. Descr.	Amount

Purchased depr. assets (details attached)	Sold or disposed of depr. assets (details attached)
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Foreign Accounts Worksheet

Account #1:					
Bank Name		Account Type	Bank	Securities	Other
Addr.	City	State		Country	Zip
Account Number		Currency			
Max. value		End year balance			
Date account opened (if in 2024)		Date account closed (if in 2024)			
Is the account owned jointly?	Yes	No			

Account #2:					
Bank Name		Account Type	Bank	Securities	Other
Addr.	City	State		Country	Zip
Account Number		Currency			
Max. value		End year balance			
Date account opened (if in 2024)		Date account closed (if in 2024)			
Is the account owned jointly?	Yes	No			

Account #3:					
Bank Name		Account Type	Bank	Securities	Other
Addr.	City	State		Country	Zip
Account Number		Currency			
Max. value		End year balance			
Date account opened (if in 2024)		Date account closed (if in 2024)			
Is the account owned jointly?	Yes	No			

Account #4:					
Bank Name		Account Type	Bank	Securities	Other
Addr.	City	State		Country	Zip
Account Number		Currency			
Max. value		End year balance			
Date account opened (if in 2024)		Date account closed (if in 2024)			
Is the account owned jointly?	Yes	No			

Account #5:					
Bank Name		Account Type	Bank	Securities	Other
Addr.	City	State		Country	Zip
Account Number		Currency			
Max. value		End year balance			
Date account opened (if in 2024)		Date account closed (if in 2024)			
Is the account owned jointly?	Yes	No			

Additional Questions

Estimated Taxes Paid:

	Federal - Amount	Federal - Date	State #1 - Amount	State #1 - Date	State #2 - Amount	State #2 - Date
1st Qtr (Apr 2024)						
2nd Qtr (Jun 2024)						
3rd Qtr (Sep 2024)						
4th Qtr (Jan 2025)						

State #1

State #2

Miscellaneous:

Yes	No	Did you make any gifts to a single recipient in excess of \$18,000 (\$36,000 with spouse)?
Yes	No	Did you receive, sell, exchange, gift, or dispose of any cryptocurrency or other digital assets?
Yes	No	Did you have any foreign income or pay any foreign taxes?
Yes	No	Did you own or have an interest in any foreign assets or accounts?
Yes	No	Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
Yes	No	Do you expect a large fluctuation in income or withholding in 2025?
Yes	No	Did you engage the services of any household employees?
Yes	No	Did you and your dependents have health coverage? (CA, MA, RI, NJ, VT, DC only)
Yes	No	Do you want information on free or low-cost health care coverage? (CA only)
Yes	No	Would you like to contribute \$3 to the presidential election campaign fund?
Yes	No	Do you grant the IRS permission to discuss your tax return with our firm?
Yes	No	Did you receive any notices from the IRS or state tax authority?
Yes	No	Received IP PIN? IP PIN (taxpayer) IP PIN (spouse)

Direct Deposit:

Refund preference:	Direct deposit	Apply to next year's taxes	Paper check	U.S. savings bonds
Bank Name	Account Type			
Routing Number	Account Number			

Notes

Notes Relating to Income Received:

Other Questions or Concerns: