

2024	1040	US	Tax Organizer
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Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2024 tax return. Please enter all pertinent 2024 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

CLIENT INFORMATION

Taxpayer

Spouse

First name and initial		
Last name		
Title/suffix		
Social security number		
Occupation		
Date of birth (m/d/y)		
Date of death (m/d/y)		
1=blind		
Home phone		
Work phone		
Work extension		
Cell phone		
E-mail address		

Address	In care of	
	Street address	
	Apartment number	
	City	
	State	
	ZIP code	

DEPENDENTS

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

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Please enter all pertinent 2024 information. If you have attached a government form for an item, check the box and do not enter a 2024 amount.

WAGES, SALARIES AND TIPS

Employer name:

Form with 5 rows for Employer name, each row starting with a checkbox.

Table with 2 columns: 2024 Amount, 2023 Amount. A shaded box labeled 'Attach Forms W-2' covers the 2024 Amount column.

INTEREST INCOME

Payer name:

Form with 5 rows for Payer name, each row starting with a checkbox.

Table with 2 columns: 2024 Amount, 2023 Amount. A shaded box labeled 'Attach Forms 1099-INT' covers the 2024 Amount column.

DIVIDEND INCOME

Payer name:

Form with 5 rows for Payer name, each row starting with a checkbox.

Table with 2 columns: 2024 Amount, 2023 Amount. A shaded box labeled 'Attach Forms 1099-DIV' covers the 2024 Amount column.

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

Form with 5 rows for Payer name, each row starting with a checkbox.

Table with 2 columns: 2024 Amount, 2023 Amount. A shaded box labeled 'Attach Forms 1099-R & W-2G' covers the 2024 Amount column. Below the table are two rows for 'Winnings not reported on W-2G' and 'Total gambling losses'.

OTHER GOVERNMENT FORMS - INCOME

Form with 4 rows for other government forms, each row starting with a checkbox.

Table with 2 columns: 2024 Amount, 2023 Amount. A shaded box labeled 'Attach Forms 1099' covers the 2024 Amount column.

Form with 1 row for 'Form 1099-G - State tax refunds' starting with a checkbox.

Table with 2 columns: 2024 Amount, 2023 Amount. A shaded box labeled 'Attach Forms 1099' covers the 2024 Amount column.

Taxpayer:

Form with 4 rows for taxpayer forms, each row starting with a checkbox.

Table with 2 columns: 2024 Amount, 2023 Amount. A shaded box labeled 'Attach Forms 1099' covers the 2024 Amount column.

Spouse:

Form with 4 rows for spouse forms, each row starting with a checkbox.

Table with 2 columns: 2024 Amount, 2023 Amount. A shaded box labeled 'Attach Forms 1099' covers the 2024 Amount column.

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MISCELLANEOUS INCOME

Taxpayer: Alimony received
Spouse: Alimony received
Other:

Table with 2 columns and 3 rows for miscellaneous income reporting.

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer: Traditional IRA contributions, Roth IRA contributions, Self-employed, SEP, SIMPLE, & qualified plan contributions
Spouse: Traditional IRA contributions, Roth IRA contributions, Self-employed, SEP, SIMPLE, & qualified plan contributions

Table with 2 columns (2024 Amount, 2023 Amount) and 6 rows for retirement plan contributions.

OTHER GOVERNMENT FORMS - DEDUCTIONS

Form 1098-E - Student loan interest
Form 1098-T - Tuition and related expenses

Table with 2 columns and 2 rows, containing a shaded cell labeled 'Attach Forms 1098'.

AFFORDABLE CARE ACT

Form 1095-A - Health Insurance Marketplace Statement

Table with 2 columns and 2 rows, containing a shaded cell labeled 'Attach Forms 1095'.

ADJUSTMENTS TO INCOME

Taxpayer: Self-employed health insurance premiums, Educator expenses, Other adjustments to income

Table with 2 columns and 2 rows for taxpayer adjustments.

Alimony paid - Recipient name & SSN

Table with 2 columns and 4 rows for alimony paid reporting, including a shaded summary row.

Spouse: Self-employed health insurance premiums, Educator expenses, Other adjustments to income

Table with 2 columns and 2 rows for spouse adjustments.

Alimony paid - Recipient name & SSN

Table with 2 columns and 4 rows for spouse alimony paid reporting, including a shaded summary row.

MEDICAL AND DENTAL EXPENSES

Prescription medicines and drugs, Doctors, dentists and nurses, Hospitals and nursing homes, Insurance premiums, Long-term care premiums - taxpayer, Long-term care premiums - spouse, Insurance reimbursement, Out-of-pocket lodging and transportation expenses, Number of medical miles, Other:

Table with 2 columns and 10 rows for medical and dental expense reporting.

TAXES PAID

State income taxes - 1/24 payment on 2023 state estimate

Table with 2 columns and 1 row for taxes paid.

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TAXES PAID (continued)

2024 Amount	2023 Amount
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- State income taxes - paid with 2023 state extension
- State income taxes - paid with 2023 state return
- State income taxes - paid for prior years and/or to other states
- City/local income taxes - 1/24 payment on 2023 city/local estimate
- City/local income taxes - paid with 2023 city/local extension
- City/local income taxes - paid with 2023 city/local return
- State and local sales taxes (except autos and special items)
- Use taxes paid on 2024 purchases
- Use taxes paid on 2023 state return
- Sales tax on autos not included above
- Sales taxes paid on boats, aircraft, and other special items
- Real estate taxes - principal residence
- Real estate taxes - property held for investment
- Foreign income taxes
- Personal property taxes (including automobile fees in some states)

INTEREST PAID

Home mortgage interest and points paid:

Attach Forms 1098	

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee):

Points not reported on Form 1098:

Investment interest (interest on margin accounts):

Passive interest.....

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Volunteer expenses (out-of-pocket)

Number of charitable miles

NONCASH CONTRIBUTIONS

NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied.

MISCELLANEOUS DEDUCTIONS

Union and professional dues

Tax return preparation fee

Safe deposit box rental

Investment expenses

Estate tax, section 691(c)

Unreimbursed employee expenses:

Other: _____
