

Tax Organizer

So we can prepare your 2025 return correctly the first time. Fill in what applies, skip what does not, and leave anything you are unsure about blank. We will sort it out together. Nothing here is a test.

PREPARED FOR

TAX YEAR

DATE COMPLETED

2025

Please do not email sensitive numbers. Send this back through your client portal, or hand it to us directly. Never email a full account number or a Social Security number. If a field feels like more than we should need, leave it blank and ask us why we want it.

1. Taxpayer

Exactly as they appear on your Social Security card.

FULL LEGAL NAME

DATE OF BIRTH

SOCIAL SECURITY OR ITIN

OCCUPATION

EMAIL

PHONE

HOME ADDRESS

CITY

STATE

ZIP

2. Spouse

Leave blank if this return is not a joint one.

FULL LEGAL NAME

DATE OF BIRTH

SOCIAL SECURITY OR ITIN

OCCUPATION

Filing status

- ☐ Single ☐ Married filing jointly
☐ Married filing separately ☐ Head of household
☐ Qualifying surviving spouse

Did your marital status change during the year?

- ☐ No ☐ Yes

3. Dependents

Anyone you supported. One row each.

NAME	RELATIONSHIP	DATE OF BIRTH	MONTHS IN YOUR HOME
NAME	RELATIONSHIP	DATE OF BIRTH	MONTHS IN YOUR HOME
NAME	RELATIONSHIP	DATE OF BIRTH	MONTHS IN YOUR HOME
NAME	RELATIONSHIP	DATE OF BIRTH	MONTHS IN YOUR HOME

CHILDCARE PROVIDER NAME, ADDRESS AND EIN

TOTAL CHILDCARE PAID	FOR WHICH CHILD
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4. Income

How many of each did you receive? Write the number, not the amounts — send us the forms themselves. A count here is how we notice one has not arrived.

W-2	1099-NEC	1099-MISC	1099-INT
1099-DIV	1099-B	1099-K	1099-R
K-1 (PARTNERSHIP)	K-1 (S CORP)	K-1 (TRUST)	SSA-1099

ANYTHING ELSE THAT WAS INCOME

5. Business or self-employment

Skip if none.

BUSINESS NAME	EIN
Accounting method	☐ Cash ☐ Accrual
GROSS RECEIPTS	WHO KEEPS THE BOOKS

Do you have a profit and loss statement for the year? ☐ Yes, attached ☐ Yes, will send ☐ No

Did you buy or sell equipment, vehicles or property? ☐ No ☐ Yes — send the details

Did you use part of your home regularly and exclusively for business? ☐ No ☐ Yes

6. Rental property

Skip if none. One block per property.

PROPERTY ADDRESS

DAYS RENTED

DAYS OF PERSONAL USE

RENTS RECEIVED

PROPERTY ADDRESS

DAYS RENTED

DAYS OF PERSONAL USE

RENTS RECEIVED

7. Deductions

Amounts you paid. Leave blank rather than estimating.

MORTGAGE INTEREST (1098)

PROPERTY TAX PAID

STATE AND LOCAL INCOME OR SALES TAX

VEHICLE REGISTRATION

CHARITABLE — CASH

CHARITABLE — NON-CASH

MEDICAL AND DENTAL

HEALTH INSURANCE PREMIUMS

STUDENT LOAN INTEREST

TUITION (1098-T)

RETIREMENT CONTRIBUTIONS — IRA, SEP, 401(K)

HSA CONTRIBUTIONS

8. Estimated payments

Federal and state, with the date each was paid.

Q1 FEDERAL	DATE	Q1 STATE	DATE
Q2 FEDERAL	DATE	Q2 STATE	DATE
Q3 FEDERAL	DATE	Q3 STATE	DATE
Q4 FEDERAL	DATE	Q4 STATE	DATE
OVERPAYMENT APPLIED FROM LAST YEAR		STATE(S) YOU PAID	

9. What changed this year

Tick anything that happened. Each one changes the return, and several are easy to forget.

Married, divorced, or widowed ☐ No ☐ Yes

A child born or adopted ☐ No ☐ Yes

Bought or sold a home ☐ No ☐ Yes

Retired, or started drawing a pension or Social Security ☐ No ☐ Yes

Received an inheritance, or gave a gift over \$18,000 to one person ☐ No ☐ Yes

Bought, sold, exchanged or received virtual currency ☐ No ☐ Yes

Received a notice from the IRS or a state agency ☐ No ☐ Yes — send it to us

10. Other states

Answer this even if nothing feels like it changed. Working across a state line, or moving part-way through the year, changes where you owe.

STATES YOU LIVED IN THIS YEAR	STATES YOU WORKED IN
Changed your state of residence during the year	☐ No ☐ Yes

IF YES, FROM WHICH STATE TO WHICH

DATE OF THE MOVE

IF YOU WORK REMOTELY, THE STATE YOU WORK FROM

THE STATE YOUR EMPLOYER IS IN

IF YOU SPLIT TIME BETWEEN STATES, ROUGHLY HOW MANY DAYS IN EACH

Earned income in a state you do not live in ☐ No ☐ Yes

Paid income tax to another state ☐ No ☐ Yes

11. Foreign accounts and assets

Its own section because the penalties for missing it are severe and it is the thing clients most often do not think to mention. Answer even if the amounts were small.

A financial account outside the United States ☐ No ☐ Yes

Signature authority over someone else's foreign account ☐ No ☐ Yes

Foreign income, property, trust or business interest ☐ No ☐ Yes

IF YES TO ANY, WHICH COUNTRIES

12. Refund or payment

If you are owed a refund ☐ Direct deposit ☐ Paper check
☐ Apply to next year

BANK ROUTING NUMBER

ACCOUNT NUMBER

Account type ☐ Checking ☐ Savings

We ask for these only so a refund reaches you or a payment can be scheduled. If you would rather give them to us another way, leave this blank and tell us.

13. Anything else

Anything you are unsure about, or that does not fit above. There are no wrong answers here.

14. Confirmation

The information I have given here is complete and correct to the best of my knowledge. I understand that the return will be prepared from what I provide, that it will not be audited or independently verified, and that I am responsible for reviewing the return before it is filed.

SIGNATURE	DATE
SPOUSE SIGNATURE, IF FILING JOINTLY	DATE