



This Tax Organizer is designed to help you collect and report the information needed to prepare your 2024 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2024 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2023 information is included for your reference. You do not need to make any 2023 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- ☐ A copy of your 2023 tax return (if not in our possession).
- ☐ Original Form(s) W-2.
- ☐ Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- ☐ Copies of other compensation or pension documentation, such as Form 1099-MISC, Form 1099-R, Form 1099-NEC or Form 1099-K.
- ☐ Form(s) 1099 or statements reporting dividend and interest income.
- ☐ Brokerage statements showing transactions for stocks, bonds, etc.
- ☐ Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- ☐ Copies of closing statements regarding the sale or purchase of real property.
- ☐ Copies of invoices regarding residential clean energy improvements.
- ☐ All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

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General Questions

ORG3

PERSONAL INFORMATION

Yes No

- 1 Did your marital status change during 2024? ☐ Yes ☐ No
If **yes**, explain
- 2 Do you want to allow your tax preparer to discuss this year's return with the IRS? ☐ Yes ☐ No
If **no**, enter another person (if desired) to be allowed to discuss this return with the IRS.
Caution: Review any transferred information for accuracy.
Designee's Name ▶
Phone Number ▶ Personal Identification Number (5 digit PIN) ▶
- 3 Do you or your spouse plan to retire in 2025? ☐ Yes ☐ No
- 4 Were you or your spouse permanently and totally disabled in 2024? ☐ Yes ☐ No
- 5 Enter date of death for taxpayer or spouse (if during 2024 or 2025): Taxpayer: _____ Spouse: _____
- 6 Were you or your spouse a member of the U.S. Armed Forces during 2024? ☐ Yes ☐ No

DEPENDENT INFORMATION

Yes No

- 7 a Do you have dependents who must file? ☐ Yes ☐ No
b If **yes**, do you want us to prepare the return(s)? ☐ Yes ☐ No
- 8 a Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,600? ☐ Yes ☐ No
b If **yes**, do you want to include your child's income on your return? ☐ Yes ☐ No
- 9 Are any of your dependents **not** U.S. citizens or residents? ☐ Yes ☐ No
- 10 Did you provide over half the support for any other person during 2024? ☐ Yes ☐ No
- 11 Did you incur adoption expenses during 2024? ☐ Yes ☐ No

IRA, PENSION AND EDUCATION SAVINGS PLANS

Yes No

- 12 Did you receive payments from a pension or profit-sharing plan? ☐ Yes ☐ No
- 13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? ☐ Yes ☐ No
- 14 a Did you convert all or part of a regular IRA into a Roth IRA? ☐ Yes ☐ No
b Did you roll over all or part of a qualified plan into a Roth IRA? ☐ Yes ☐ No
- 15 Did you contribute to a Coverdell Education Savings Account? ☐ Yes ☐ No

ITEMS RELATED TO INCOME/LOSSES

Yes No

- 16 Did you receive any disability payments in 2024? ☐ Yes ☐ No
- 17 Did you receive tip income **not** reported to your employer? ☐ Yes ☐ No
- 18 Did you buy, sell, refinance, or abandon a principal residence or other real property in 2024? ☐ Yes ☐ No
(Attach copies of any escrow statements or Forms 1099.)
- 19 a If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home? ☐ Yes ☐ No
b Are you planning to purchase a home soon? ☐ Yes ☐ No
c Did you incur any casualty or theft losses during 2024? ☐ Yes ☐ No
- 20 Did you incur any non-business bad debts? ☐ Yes ☐ No

PRIOR YEAR TAX RETURNS

Yes No

- 21 Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? ☐ Yes ☐ No
If **yes**, enclose agent's report or notice of change.
- 22 Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return? ☐ Yes ☐ No

General Questions (continued)

ORG3

FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

	Yes	No
23 Did you have foreign income or pay any foreign taxes in 2024 ?	☐	☐
24a At any time during 2024, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?	☐	☐
b Did the aggregate value of all your foreign accounts exceed \$10,000 at any time during 2024 ? Report all interest income on Org 11	☐	☐
25 Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust?	☐	☐
26 Did you at any time during 2024, have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded \$50,000 in value at any time during the year?	☐	☐

HEALTH AND LIFE INSURANCE

	Yes	No
27 Did you receive Form 1095-A (Health Coverage)? If so, please attach	☐	☐
28a Did you or your spouse have self-employed health insurance?	☐	☐
b If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?	☐	☐
29 Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries named by you?	☐	☐
30 Did you contribute to or receive distributions from a Health Savings Account (HSA)?	☐	☐

MISCELLANEOUS

	Yes	No
31 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024 ? If yes, please attach details	☐	☐
32 Did you purchase a motor vehicle or boat during 2024 ?	☐	☐
If yes, attach documentation showing sales tax paid.		
33 Did you purchase an energy efficient vehicle in 2024 ?	☐	☐
If yes, enter year, make, model, and date purchased: _____ also provide VIN: _____		
34 Did you donate a vehicle in 2024 ? If yes, attach Form 1098C	☐	☐
35 What was the sales tax rate in your locality in 2024 ? _____ % State ID		
36 Did you or your spouse make gifts of over \$18,000 to an individual or contribute to a prepaid tuition plan?	☐	☐
37 Did you make gifts to a trust?	☐	☐
38 If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association?	☐	☐
If yes, please attach details.		
39 Did you or your spouse participate in a medical savings account in 2024 ?	☐	☐
If yes, please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)		
40 Did you make a loan at an interest rate below market rate?	☐	☐
41 Did you pay any individual for domestic services in 2024 ?	☐	☐
42 Did you pay interest on a student loan for yourself, your spouse, or your dependents?	☐	☐
43 Did you, your spouse, or your dependents attend post-secondary school in 2024 ?	☐	☐
44 Did a lender cancel any of your debt in 2024 ? (Attach any Forms 1099-A or 1099-C)	☐	☐
45 Did you receive any income not included in this Tax Organizer?	☐	☐
If yes, please attach information.		
46 At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	☐	☐
47a Do you want to change the language with which the IRS communicates with you?	☐	☐
b If yes, which language?		

ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

	Yes	No
48 If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
49 The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐
Caution: Review transferred information for accuracy.		
50 If yes, please provide the following information:		
a Name of your financial institution		
b Routing Transit Number (must begin with 01 through 12 or 21 through 32)		
c Account number		
d What type of account is this?	Checking ☐	Savings ☐
☒ Please attach a voided check (not a deposit slip) if your bank account information has changed.		

Health Insurance Coverage

ORG3A

Preparer note: The fields on this form are non-enterable. This worksheet is meant to gather client data only. This worksheet will not transfer to the ProSeries/1040 product. Data from this worksheet must be manually entered on the appropriate form in ProSeries/1040.

Part 1 Coverage

Enter the name, SSN/DOB and health insurance status for each person who will claim on your return in the table below:

Name of covered individual(s)	SSN or DOB	Covered 12 mos	Exchange Policy	Exemption Received	Indicate which months each person was covered by MEC*:											
					Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1.																
2.																
3.																
4.																
5.																
6.																
7.																
8.																
9.																

*Minimum Essential Coverage (MEC) includes employer-sponsored coverage, health insurance purchased through the Health Insurance Marketplace (Exchange), Medicare, Medicaid, certain VA coverage, Tricare, etc.

For tax year 2020, the Federal ACA tax penalty has been eliminated, however, you may still be subject to a state tax penalty depending on where you live because some states have created their own individual insurance mandates to replace the federal version. These mandates require state residents to have qualifying health coverage or pay a fee with their state taxes.

Use this worksheet to list the names of individuals listed on the income tax return and their health care insurance coverage status. It will help your tax preparer determine who has health insurance coverage.

If you purchased a health insurance policy from an exchange (or Marketplace), check the Exchange Policy box above. You will receive Form 1095-A from the exchange that issued your policy. Please provide this form with your Organizer documents to your tax preparer.

Please call with any questions on this worksheet.

ORG3A

Business/Investment Questions

ORG4

	Yes	No
1 Did you receive stock from a stock bonus plan with your employer? (Do not include stock sales included on your W-2.)	☐	☐
2 Did you buy or sell any stocks or bonds in 2024 ? If yes , attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	☐	☐
3 Did you surrender any U.S. savings bonds during 2024 ?	☐	☐
4 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
5 Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation?	☐	☐
6 Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?	☐	☐
7 Do you have any investments for which you were not personally 'at risk' (other than sole proprietorship or farm)?	☐	☐
8 Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2024 ?	☐	☐
9 Did you sell property or equipment on installment in 2024 ?	☐	☐
10 Did you have any business related educational expenses?	☐	☐
11 Did you do a 'like-kind' exchange of property in 2024 ?	☐	☐
12 Deductions for travel and meals may be allowed under certain circumstances. Adequate records must be presented. Information must include: 1 Amount; 2 Time and place; 3 Date; 4 Business purpose; 5 Description of gift(s); and 6 Business relationship of recipient Do you have records to support expenses?	☐	☐
13 Did you purchase special fuels for non-highway use? If yes , please list the type of use and the number of gallons for each fuel. _____ _____ _____ _____ _____	☐	☐

PERSONAL INFORMATION

	TAXPAYER	SPOUSE
Last name	_____	_____
First name	_____	_____
Middle initial and suffix	MI Suffix	MI Suffix
Social security number	_____	_____
Occupation	_____	_____
Work phone/extension	_____	_____
Cell phone	_____	_____
E-mail address	_____	_____
Driver's License/Id issuing state	_____	_____
License /Id number	_____	_____
License/Id issue date	_____	_____
License/Id expiration date	_____	_____
Birthdate	MM/DD/YYYY	MM/DD/YYYY
Blind	Yes ☐ No ☐	Yes ☐ No ☐
Contribute to Presidential Election Campaign Fund	Yes ☐ No ☐	Yes ☐ No ☐
Eligible to be claimed as a dependent on another return	Yes ☐ No ☐	Yes ☐ No ☐
Street address.....	_____	Apartment number _____
City	_____ State	ZIP code..... _____
Home phone.....	_____ Foreign country	_____
Fax	_____ Foreign phone	_____

FILING STATUS

☐ **1** Single
☐ **2** Married filing jointly
☐ **3** Married filing separately

Check this box if you **did not** live with spouse at any time during the year ☐
 Check this box if you are eligible to claim spouse's exemption ☐
 Check this box if your spouse itemizes deductions ☐

☐ **4** Head of household
 If the qualifying person is a child but not your dependent, enter
 Child's name..... Child's social security number.....

☐ **5** Qualifying surviving spouse
 Check the box for the year the spouse died 2022 ☐ 2023 ☐

DEPENDENT INFORMATION

Full Name (first name, middle initial, last name, suffix)	Social Security Number	**Code +Months in U.S.	Not qua- lified credit Other dep	Date of Birth *Not Citizen	2024 Child Care Expense
					2023 Child Care Expense
			☐	☐	
			☐	☐	
			☐	☐	
			☐	☐	

** For the Dependent Code, enter the following:

L = dependent child who lived with you

N = dependent child who didn't live with you due to divorce or separation

O = other dependent

Q = not a dependent (but is a person who qualifies your client for the earned income credit and/or the credit for child and dependent care expenses)

+ Enter the number of months dependent lived with you, and/or your spouse if married filing jointly, in the U.S.

* Check this box if dependent child is not a U.S. citizen or resident alien

Interest and Dividend Income

ORG11

T = Taxpayer, S = Spouse, J = Joint

INTEREST INCOME

☒ Attach all copies of your Form 1099-INTs here.

****Type of Interest**

blank = Regular taxable interest

ME1 = ME bond interest in federal income

MD1 = MD nontaxable interest — taxable federal

MA1 = MA bank interest

NH1 = NH nontaxable interest — taxable federal

NJ1 = NJ nontaxable interest — taxable federal

OK1 = OK bank interest

TN1 = TN nontaxable interest — taxable federal

WV1 = WV bond interest in federal income

TSJ	X*	Payer Name	2024 Box 1 Interest	Type of Interest**	2024 Box 3 US/Treasury Interest	2024 Box 8 Tax Exempt	State	2023 Box 1 + 3

X* Check if you did not receive income from this account in 2024 .

DIVIDEND INCOME

☒ Attach all copies of your Form 1099-DIVs here.

TSJ	X*	Payer Name	2024 Box 1a Ordinary Dividends	2024 Box 1b Qualified Dividends	2024 Box 2a Capital Gains	State	2023 Box 1a + 2a

X* Check if you did not receive income from this account in 2024 .

Medical and Tax Expenses

ORG13

MEDICAL AND DENTAL EXPENSES	2024	2023
1 Prescription medications		
2 Health insurance premiums (enter Medicare B on ORG10)..... Exclude premiums paid through an exchange (Form 1095-A)		
3 Qualified long-term care premiums		
a Taxpayer's gross long-term care premiums		
b Spouse's gross long-term care premiums		
c Dependent's gross long-term care premiums		
4 Enter self-employed health insurance premiums on ORG19, ORG27, ORG45A, or ORG46A for the appropriate activity		
5 Insurance reimbursement.....		
6 Doctors, dentists, etc		
7 Hospitals, clinics, etc		
8 Lab and X-ray fees.....		
9 Expenses for qualified long-term care		
10 Eyeglasses and contact lenses		
11 Medical equipment and supplies		
12 Miles driven for medical purposes 01/01/2024 thru 12/31/2024		
13 Ambulance fees and other medical transportation costs		
14 Lodging.....		
15 Other medical and dental expenses:		
a		
b		
c		
d		
e		
f		
g		
h		
i		
j		
TAXES	2024	2023
Enter state and local income taxes on ORG7, ORG8, ORG10, and ORG40.		
16 Real estate taxes paid on principal residence		
17 Real estate taxes paid on additional homes or land		
18 Auto registration fees based on the value of the vehicle		
19 Other personal property taxes		
20 Other taxes:		
.....		
.....		

Interest Paid and Cash Contributions

ORG14

HOME MORTGAGE INTEREST PAID

Lender's Name	Check if NOT on Form 1098	2024	2023
	☐		
	☐		
	☐		
	☐		

POINTS PAID ON LOAN TO BUY, BUILD, OR IMPROVE MAIN HOME

Lender's Name	Check if NOT on Form 1098	2024
	☐	
	☐	
	☐	
	☐	

SELLER FINANCED MORTGAGE

Individual's Name	Identifying Number	Address

OTHER PERSON RECEIVING FORM 1098

Form 1098 Recipient's Name	Address

OTHER POINTS

Enter below any points paid on a home equity loan (other than to improve your main home), a loan for a second home, or a refinanced mortgage.

Lender's Name	Loan Over	Points Paid	Date of Loan	Loan Length (years)	2023 Points Deducted
	☐				
	☐				
	☐				
	☐				

QUALIFIED MORTGAGE INSURANCE PREMIUMS

	2024	2023
Premiums paid in 2024 for qualified mortgage insurance not from Form 1098 import		

ORG14

Noncash Contributions

ORG14A

Copy 1

Name of Donee Organization	Check if Statement Exists for Gifts of \$250 or More	Fair Market Value	Prior Year Fair Market Value
A _____			
B _____			
C _____			
D _____			
E _____			
F _____			
G _____			
H _____			
I _____			

Note: Complete sections below **only** if the **total** noncash contributions are **more than \$500**.

Description of Donated Property	Type**	Address of Donee Organization
A _____		
B _____		
C _____		
D _____		
E _____		
F _____		
G _____		
H _____		
I _____		

Method for Fair Market Value*	Date of Contribution	Complete these columns only for each contribution over \$500		
		Date Acquired (month, year)	How Acquired***	Your Cost
A _____				
B _____				
C _____				
D _____				
E _____				
F _____				
G _____				
H _____				
I _____				

*Methods of determining FMV:

Appraisal	Capitalization of income	Present value	Thrift shop
Average share	Comparative sales	Replacement cost	
Catalog	Consignment shop	Reproduction cost	

**Type of Donated Property

Household/clothing items	Business equipment	Intellectual property
Motor vehicle, boat or airplane	Business inventory	Real property, conservation property
Art, other than self-created	Stock, publicly traded	Real property, other than conservation
Art, self-created	Stock, other than publicly traded	Other personal property
Collectibles	Securities, other than stock	Other intangible property

***How Property was Acquired: Purchase, Gift, Inheritance, Exchange

Miscellaneous Itemized Deductions (FOR STATE USE ONLY)

ORG15

MISCELLANEOUS DEDUCTIONS (2% LIMITATION)	2024	2023
Employee Business Expenses		
Note: If you have any travel, transportation, meal expenses or your employer reimbursed you for any of your job-related expenses, complete ORG17 for all your employee expenses.		
1 Union and professional dues		
2 Professional subscriptions		
3 Uniforms and protective clothing		
4 Job search costs		
5 Other unreimbursed employee expenses:		
a		
b		
c		
d		
e		
Other Expenses Subject to the 2% Limitation		
Treat all MACRS assets for this activity as qualified Indian reservation property? ☐ Yes ☐ No		
Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ☐ Regular ☐ Extension ☐ No		
Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ☐ Yes ☐ No		
Was this property located in a Qualified Disaster Area? ☐ Yes ☐ No		
Check to code assets as Investment Expense ☐		
Use ORG50 to record dispositions.		
Use ORG51A to enter additional assets.		
Use ORG11a for investment expenses related to interest income.		
Use ORG11b for investment interest related to dividend income.		
6 Tax return preparation fees		
7 Investment counsel and advisory fees		
8 Certain attorney and accounting fees		
9 Safe deposit box rental		
10 IRA custodial fees		
11 a Government unemployment benefits repaid in 2024 ☐		
b Other expenses (list):		
.....		
.....		
.....		
.....		
.....		
OTHER MISCELLANEOUS DEDUCTIONS	2024	2023
12 Federal estate tax paid on income in respect of a decedent		
13 Amortizable bond premiums (acquired before 10/23/86)		
14 Gambling losses (to the extent of gambling income)		
15 Claim repayments		
16 Unrecovered investment in annuity		
17 Ordinary loss attributable to certain debt instruments		

State Information Worksheet

ORG60

GENERAL INFORMATION

	Taxpayer	Spouse
1 Enter your state of residence	_____	_____
2 Check the appropriate box if:	Taxpayer	Spouse
a Full year resident.....	☐	☐
b Part year resident	☐	☐
c Nonresident	☐	☐
	Date of entry: _____	Date of exit: _____
3 Resident locality: _____		
4 County: _____	School district: _____	School district number: _____
	Taxpayer	Spouse
5 Check if disabled	☐	☐

STATE CREDITS

6 Description/type of credit (for example, solar energy, carpool)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

VOLUNTARY STATE CONTRIBUTIONS

7 Description/type of contribution (for example, wildlife, cancer)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

MISCELLANEOUS QUESTIONS

	Yes	No
8 Did you file a state return for 2023 ?	☐	☐
9 Do you want state forms and instructions sent to you next year?	☐	☐
10 Do you want any applicable penalty and interest calculated and added to the return?	☐	☐
11 How do you want your state refund (if any) applied?		
a Refunded ☐	b Apply to 2025 estimates ☐	c Apply to 2025 taxes ☐
12 Additional state information: _____		

Smart Worksheets From 2024 Organizer Form

ORG0: 2024 Tax Organizer -- Smart Worksheet

Preparer Information: The last six lines below will print the firm name, preparer name, firm address, firm telephone number, firm fax number, and firm or preparer e-mail address based on the boxes checked below. See help for additional information.

Access Miscellaneous Global Options for Organizer Only to set this globally for all clients (See Help for additional information).

QuickZoom to change Miscellaneous Global Options for Organizer ►

Check to not print firm name	☐
Check to not print preparer name	☒
Check to not print firm address	☐
Check to not print firm phone number	☐
Check to not print firm fax number	☐
Check to not print firm e-mail address	☐
Check to print preparer e-mail address (ONLY if firm e-mail is not used)	☐
Check to print preparer phone number (ONLY if firm phone number is not used)	☐

QuickZoom to change preparer and firm information ►