

Tax Organizer—Your thorough completion of this organizer will assist you and us in preparing a timely and accurate tax return. **This organizer MUST be SIGNED AND RETURNED to us with your tax documents!!**

Name: _____ Phone: _____ E-Mail: _____

DOCUMENT TO DROP OFF:			
W-2's, 1099's and Unemployment Stmt (paper copies)		Copy of Driver's License _____	
Health Ins doc 1095-A (only needed if in Marketplace)		HFS Worksheets : C, F, E	
Interest & Dividends Forms: 1099-int, 1099-div, year-end investment statements		Available at teamhoff.com	
Pension, IRA, Annuity, Social Security, and Railroad Retirement 1099 forms		Under Forms Tab	
Real Estate Tax slips (amounts you paid in the current tax year)			
Home Mortgage Interest slips (secured by personal residence)		Finished Return Preference	
Post High School Education paid (tuition forms from school, room & board, & books)		Circle One: Paper (\$20 chg)	
Direct Deposit Information (Voided Check or Deposit Slip)		Digital (email or vault)	
MEDICAL EXP YOU PAID (Not using HSA Money)		CHARITABLE CONTRIBUTIONS	
Health ins premiums pd out of pocket	\$ _____	Cash Contributions	\$ _____
Long-term care insurance premiums	\$ _____	Non-Cash Contribution Value	\$ _____
Out of Pocket Medical Exp That Exceeds \$10,000 total Doctors, Dentists, Meds	\$ _____	Miles Driven for Charity Exp	\$ _____
Miles Driven for Med Exp		ANNUAL RENT PAID (HOME)	
		Amount	Heat Included
		\$ _____	Yes or No
OTHER INCOME		CHILD & DEPENDENT CARE	
Sources	Amount	Provider	
Alimony received	\$ _____	SSN or EIN	
Nontaxable Inheritance, Gifts, Loans	\$ _____	Amount Pd	\$ _____
Scholarships, Fellowships, Grants	\$ _____		
State income tax refunds	\$ _____		
Tips received	\$ _____	¼ ESTIMATED INCOME TAXES PAID FOR 2024	
Unemployment comp (need stmt)	\$ _____	Date Due	Federal State
Workers' compensation	\$ _____	1st - April 15	\$ \$
Jury duty, prize/gambling winnings	\$ _____	2nd - June 15	\$ \$
Partnership, Estate, Trusts (bring in K-1s)	\$ _____	3rd - Sept 15	\$ \$
Airbnb, Itsy, Uber, Lyft etc.	\$ _____	4th - Jan 15	\$ \$
ANSWER ALL QUESTIONS			
YES	NO	During the year, did you or your spouse:	
		Help support anyone else not listed as a dependent?	
		Buy or sell real estate? If so, bring closing statements	
		Convert a Traditional IRA to a Roth IRA? Or Rollover/ transfer any IRAs or retirement accts?	
		Did you or your spouse contribute to an IRA? (Not with employer plan)	
		Pay alimony? Paid to: _____ SSN: _____	
		Pay interest on student loans? Amount \$ _____	
		Pay any interest to buy or hold investments/land/stock/etc.?	
		Virtual Currency (Cryptocurrency) Buy or Sell any? Need transaction documents	
		Put money into WI Ed Vest? Amount \$ _____	
		Make any out of state or online purchases on which no sales tax was charged? \$ _____	
		Make any Residential Energy Credit improvements?	
		Did you receive any correspondence from the IRS or State?	
		Any births, adoptions, marriages, divorces, or death in your immediate household family?	
		Have any debt canceled (credit cards, loans, etc.)?	
		Did you have any foreign bank accounts or signature authority over one?	
		Buy classroom supplies (K-12 teachers/aids only)? NEED RECEIPTS, Amount? _____	
		Any HSA distributions? Used for medical expenses? Need tax form from Custodian	

To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's tax return for which I have adequate records.

Signature: _____ Signature: _____ Date: _____