

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 and year-end pay stubs			Check for Yes	
Health Ins doc 1095-A (only needed if in Marketplace)			Do you receive Tip Income	
Interest & Dividends Forms: 1099-int, 1099-div, year-end investment statements			Are you paid Overtime?	
Pension, IRA, Annuity, Social Security, and Railroad Retirement 1099 forms				
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)			Check One: Paper	
Direct Deposit Information (Voided Check or Deposit Slip)			Digital	
MEDICAL EXP YOU PAID (Not using HSA Money)		CHARITABLE CONTRIBUTIONS		
Health ins premiums (not Employer Plan)	\$	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	\$	
RENT PAID				
Miles Driven for Med Exp	\$	Amount	Heat Included Yes No	
OTHER INCOME		CHILD & DEPENDENT CARE		
Sources	Amount	Provider		
Alimony received	\$	SSN or EIN		
Nontaxable Inheritance, Gifts, Loans	\$	Amount	\$	
Scholarships, Fellowships, Grants	\$			
State income tax refunds	\$			
Tips received	\$	1/4 ESTIMATED INCOME TAXES PAID IN FOR 2025		
Unemployment compensation	\$	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?		
		If so, how much was the total of online purchases?		
		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 contributions / 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: _____