

2025 Tax Organizer

- Please include a copy of the signed *Service Engagement Letter*.
- Did you buy, sell, exchange or otherwise acquire any financial interest in virtual currency or digital asset, such as bitcoin? _____

General Information

- For new clients, please send copies of social security cards and driver's licenses or state ID cards for both the taxpayer and spouse. For returning clients, fill in your name and any information that has changed from last year in this section. All other sections of this form need to be filled out completely.

Taxpayer

Full Name: _____
Social Security Number: _____ Occupation: _____
Date of Birth: _____ Age: _____ Legally blind: _____
Home/cell phone: _____ Best time to call: _____
Work phone: _____ Best time to call: _____
E-mail: _____

Spouse

Full Name: _____
Social Security Number: _____ Occupation: _____
Date of Birth: _____ Age: _____ Legally blind: _____
Home/cell phone: _____ Best time to call: _____
Work phone: _____ Best time to call: _____
E-mail: _____

Complete Address: _____
County name: _____ School district: _____
Resident state: _____ Non-resident state: _____

Marital status: Married Single Divorced Separated Widowed

- If you are claiming an exemption for a child from a previous marriage, please enclose the pages from your divorce decree that states who is legally able to claim the child, along with the title page and the signature page.

Can you be claimed on anyone else's tax return? _____

Are you a US citizen? _____ If not, what visa do you have? _____

Dependents

- If I have the information on your child(ren) from a prior year, you need to only list their name below. Otherwise, fill out all the information for the child and include a copy of their social security card.

Name	SS Number	Date of Birth	Relationship	Months in Home during 2025

- Did you adopt any children during 2025? _____

Income

- Please list all employers below. Enclose a copy of each W-2, as well as any statements from your employer(s) showing benefits withdrawn from your pay during the year. Also, enclose your final paycheck stub for the year if you have it available.

Employer	Employer

Do you have any tip income? _____

- Please list interest that was paid to you. Be sure to include tax exempt interest. Enclose a copy of each Form 1099-INT.

Interest Payer's Name	Interest Payer's Name

- Did you pay any penalties for taking money out of a savings or CD early? _____
Do you have any foreign bank accounts? _____
Do you have foreign investments worth more than \$10,000 (including pensions)? _____
Are you an authorized signer on any foreign account (checking, savings, etc.)? _____

- Please list any dividends that were paid to you. Enclose a copy of each Form 1099-DIV.

Dividend Payer's Name	Dividend Payer's Name

- Did you sell any stocks, bonds or other capital assets, including gold, silver or collectibles? _____

Please enclose copies of Form 1099-B and list below.

Capital Assets Sold	Capital Assets Sold

- If capital assets were sold and not reported on Form 1099-B, please include the following information: description, date acquired, date sold, cost when purchased, sale price.
- Did you itemized deductions last year and receive a state tax refund? _____
- Did you receive alimony in 2025? _____ If so, what year was your divorce agreement finalized or revised? _____ How much did you receive in alimony during 2025? _____
- Did you have income from a business in 2025? _____ If so, please use the *Self-Employed Tax Sheet*, *MK Tax Sheet*, or *Day Care Tax Sheet* to record your income and expenses. If you received a Form 1099-MISC or 1099-K for your business, please enclose a copy.
- Did you sell any assets that were previously used in your business? _____ If so, enclose information regarding the sale of them.
- Did you take any money out of an IRA, 401(K) or other pension? _____ Did you roll any money over from one plan into another plan? _____ Please list below and enclose copies of Form 1099-R.

Payer	Payer

- If an RMD from your IRA was taken out, was it given to charity? _____
- Did you receive social security benefits? _____ If so, please enclose Form 1099-SSA.
- Do you have income from rental property? _____ If so, please fill out the *Rental Income Tax Sheet* and enclose.
- Do you have income from K-1's (partnerships, S-corps)? _____ Did you receive royalties? _____ If so, please enclose copies of statements.
- Did you receive unemployment compensation? _____ If so, please enclose statement.
- Did you have any debt cancelled last year, including foreclosures and cancelled credit card debt? _____ If so, enclose Form 1099-C or 1099-A
- Did you have any income from gambling? _____ If so, how much? _____ Please enclose statements showing income and losses.
- Do you have income from any other source? _____ If so, please enclose information.

Adjustments

- If you are a full-time teacher, K-12, please write the amount of unreimbursed classroom expenses you had for last year. _____
- Did you contribute money to an IRA last year? _____ Please list the amount and type of contribution or enclose a statement. Was it a Roth or Traditional IRA? _____
- Did you pay student loan interest last year? _____ Please enclose statement.
- Did you pay alimony last year? _____ If so, list the recipient, his/her social security number and how much was paid. What year was the divorce decree finalized or revised? _____

Deductions

- Please list amount of health insurance you paid *out-of-pocket*. _____
Was it paid through your flex spending account at work or through a plan set up while you were self-employed? _____ Do you have a Health Savings Account (HSA)? _____
Please enclose Form 1095 if you purchased health insurance through the Marketplace.

List other health expenses:

Prescriptions:	\$ _____
Medicare B and D	\$ _____
Dental	\$ _____
Eye correction	\$ _____
Long term care insurance	\$ _____
Other medical and dental	\$ _____
Number of miles driven for medical/dental care	_____

For all expenses, only count those that were not paid through a flex-spending account or an HSA.

- Did you pay real estate taxes during 2025? _____ Please enclose statement.
Did you pay state taxes for a prior year during 2025? _____ If so, how much? _____
Did you pay any foreign taxes or personal property taxes during 2025? _____
Did you purchase any big-ticket items, such as car, boat, etc. _____
- Did you pay mortgage interest? _____ Please enclose all Form 1098s. If not reported to you on a Form 1098 (if you paid to an individual), please make a note of how much was paid and to whom it was paid and include their social security number.
Did you refinance your mortgage during 2025? _____
Did you pay any interest on investments? _____
- Did you have charitable contributions during 2025? _____ If so, please list the amounts below.

Amount given by check, cash, or credit card	\$ _____
Fair market value of "stuff" donated (such as at Goodwill)	\$ _____
Other donations, such as stocks	\$ _____
Mileage for volunteer work	_____
- Were you in a federally declared disaster area last year? _____

Credits

- Please list any child care expenses for 2025. Enclose statement(s) if available.

Child's name: _____ Care provider's name: _____

Provider's address: _____

Care provider's tax ID number: _____ Amount paid: _____

Child's name: _____ Care provider's name: _____

Provider's address: _____

Care provider's tax ID number: _____ Amount paid: _____

- Did you pay tuition and fees for yourself or a dependent? _____ If so, please enclose 1098-T from the college.
- If you live in Wisconsin, did you pay tuition for any private school for your dependents? _____ If so, how much? _____
- Did you make any energy efficient improvements to your home or have an energy audit?
- Did you purchase a new vehicle during 2025? _____ Did you purchase a clean vehicle? _____

Miscellaneous

- Did you make any estimated income tax payment for federal or state? _____ Please list below.
- For Wisconsin residents, list the amount of rent paid last year. _____ Did it include heat? _____

Direct Deposit

- If you want your refund to be directly deposited into your account, list the information below. Include a voided check only if it's a different account from last year.

Name of bank: _____

Please circle one: savings checking

Routing number: _____

Account number: _____

The information listed on this form is accurate to the best of my knowledge. (Please sign below).

Taxpayer

Spouse