

2025 INDIVIDUAL INCOME TAX ORGANIZER – NEW CLIENTS

• COMPLETED TAX RETURN DELIVERY: ☐ Pickup ☐ Mail ☐ Portal	• TEXT NOTIFICATION OPTION: ☐ Check box if you would like to opt-in to text notifications
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TAXPAYER:
 Name _____
 Address _____
 City _____ State _____ Zip _____
 PH _____
 Email _____
 SSN _____ DOB _____
 Driver's License # _____ State _____
 Issue Date _____ Expiration Date _____

SPOUSE:
 Name _____
 Address _____
 City _____ State _____ Zip _____
 PH _____
 Email _____
 SSN _____ DOB _____
 Driver's License # _____ State _____
 Issue Date _____ Expiration Date _____

Direct Deposit Information: **NOW REQUIRED FOR ALL REFUNDS, paper checks will no longer be issued by the Federal Government.

 Name of Financial Institution _____
 Please Check One: ☐ Checking ☐ Savings
 Account Number _____
 Routing Number _____

 Name of Financial Institution _____
 Please Check One: ☐ Checking ☐ Savings
 Account Number _____
 Routing Number _____

DEPENDENTS CLAIMED IN 2025: ☐ No ☐ Yes If yes, please complete the information below:

Dependent Name & Relationship	DOB	SSN	If over 17, Full Time Student?	# of months in the home?	Did you provide over ½ support?	Childcare expenses incurred?

ESTIMATED TAX PAYMENTS MADE: ☐ No ☐ Yes If yes, please complete the information below:

Period	FEDERAL	Date Paid	STATE	Date Paid	CITY	Date Paid
Q1	\$		\$		\$	
Q2	\$		\$		\$	
Q3	\$		\$		\$	
Q4	\$		\$		\$	

IRS Identity Protection Pin (IP PIN): Do you have an IP PIN: ☐ Yes ☐ No If yes, what is your PIN #: _____

*You will only have this pin if you specifically requested one from the IRS or the IRS notified you by mail that they assigned you one.

Required Tax Forms, if applicable:

- ☐ Did you receive, sell, or exchange or dispose of a digital asset?
- ☐ Did you purchase health insurance through the Marketplace on Healthcare.gov?
- ☐ Did you contribute to an IRA? Please check one: ☐ Traditional or ☐ Roth \$ _____
- ☐ Did you take a distribution from an IRA, pension, annuity or employer retirement account?
- ☐ Did you receive Social Security Benefits?
- ☐ Did you earn any qualified tips or overtime?
- ☐ Did you receive unemployment?
- ☐ Did you have any gambling winnings?
- ☐ Did you have any cancelation of debt?
- ☐ Did you receive income through payment apps? (i.e. Venmo, Cash App, Facebook Marketplace)
- ☐ Did you make any energy efficient home improvements?
- ☐ Did you purchase a new vehicle qualifying for loan interest deduction or electric vehicle credit?
- ☐ Did you have any qualified education expenses, college tuition, etc.?
- ☐ Did you pay any student loan interest?
- ☐ Did you take a distribution from, or contribute to, an HSA?
- ☐ Did you make a monetary donation for Ohio's Scholarship Donation Credit?
- ☐ Were any deposits made to an Ohio Homebuyer Plus Account?
- ☐ Did you contribute to a 529 plan?

Forms/Documentation to Provide:

- 1099-DA
- 1095-A
- 5498 / Year End Statement
- 1099-R
- SSA-1099
- Statement from Employer
- 1099-G
- W-2G
- 1099-C
- 1099-K
- Invoice with Description & Amt. Paid
- Invoice / Statement of Interest Paid
- 1098-T
- 1098-E
- 1099-SA / 8889
- Letter from SGO
- Year-End Account Statement
- Year-End Account Statement

PLEASE BE CERTAIN TO INCLUDE ALL W-2's, 1099's and K-1 STATEMENTS