



2024 | 1040 | US | Tax Organizer

Tax Payer:

Spouse:

Yes No

PERSONAL INFORMATION

- 1a. Are you an **existing** EYS Taxes client?
- 1b. Does EYS have a copy of your **prior year tax return**?
- 1c. Will all of your tax documents be available and provided to EYS by April 1st?
- 2a. What is your marital status as of 12/31/2024?
- 2b. Were there any changes to your marital status in 2024?
- 2c. N/A Did you get married in 2024?
- 2d. N/A Did you get divorced in 2024?
3. Were there any changes to your **Address** in 2024?
- 4a. Did you have any **Dependencies** in 2024?
- 4b. Do you need EYS to file any tax returns for your dependents?
- 4c. Were there any changes to your dependents in 2024?

INCOME

5. Did you received any **W-2's** for 2024?
6. Did you receive any **Interest, Dividend, or Capital gain income**?
7. Did you or a dependent receive any **Social Security** income for 2024?
8. Did you receive a **Distribution/rollover** from a retirement account, pension, or annuity?
9. Did you receive any **Gambling Income** for 2024?
10. Did you own any **Rental Properties** during 2024?
11. Did you receive any **K-1's** for any businesses not prepared by EYS for 2024?
- 12a. Were you **Self-Employed** (received 1099-NEC income) during 2024?
- 12b. N/A Did you **Use a portion of your Home** exclusively for self-employed business purposes during 2024?

Tax Payer:

Yes No

INCOME

- 12c. N/A Did you **Use your Vehicle** for self-employed business purposes during 2024?
- 12d. N/A Did you purchase your own **Health Insurance Policy** during 2024?
- 12e. N/A Did you/would you like to **Contribute to a Self- employed retirement plan** (solo 401k, SEP IRA, Simple IRA, profit-sharing plan, etc.) for 2024?
- 13a. Did you **Sell a House** during 2024?
- 13b. Was the house you sold being used as a **Rental Property**?
14. Did you have any **Other Income** for 2024?

DEDUCTIONS

15. Did you **Own a Home** during 2024?
16. Did you make any **Charitable Contributions** during 2024?
17. Did you **Own a Car or Boat** during 2024?
18. Did you pay for any substantial **Medical Expenses** out of pocket during 2024?
19. Did you/a dependent pay any **Student Loan Interest or Education Expenses** during 2024?
20. Did you/would you like to contribute to a **Traditional IRA** for 2024?
21. Did you/would you like to contribute to a **Roth IRA** for 2024?
22. Did you/would you like to contribute to an **HSA** outside of your payroll for 2024?
23. Are there any **Other Deductions** you think you might be eligible for that were not mentioned previously?

CREDITS

24. Did you purchase an **Electric Vehicle** during 2024?
25. Did you have **Solar Panels or an Electric Vehicle charging station** installed during 2024?
26. Did you pay for any **Child Care** for any dependent under 13 during 2024?
27. Are there any **Other Credits** you think you might be eligible for that were not previously mentioned?

Tax Payer:

Yes No

MISCELLANEOUS

28. Were you or your spouse **Active Duty Military** during 2024?
29. At any time during 2024 did you own, purchase, or sell any **Digital Assets** (cryptocurrencies, NFTs, etc.)?
30. At any time during 2024 did you or your spouse have signature authority over a **Foreign Bank Account**?
31. Did your state/country of **Primary Residence** change during 2024?
32. Did you make any **Estimated Tax Payments** for 2024?
33. If applicable, would you like any refunds to be **Directly Deposited** into a bank account?
34. If applicable, would you like any **amounts due** with your return **Automatically Withdrawn** from a bank account? your tax returns?
35. If applicable, would you like any estimated **tax payments** **Automatically Withdrawn** from a bank account?
36. Did you make any **Non-Charitable Gifts** over \$17,000 (\$34,000 if married filing joint) to any single individual during 2024?
37. Is there any **Additional Information** you'd like to provide that you think would be helpful in preparing your tax returns?

Tax Payer:

Based on your responses in the questionnaire above, please provide us with the following documents and information:

New Address Information

Street Unit	<input type="text"/>	<input type="text"/>
City State Zip Code	<input type="text"/>	<input type="text"/>
Country (If not US)	<input type="text"/>	

New Dependent Information

Name	Date of Birth	Social Security Number	Relationship
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Foreign Bank Account Information

No.	Financial Institution	Address	A/c Number	A/c Type	Max balance in 2024	Currency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Estimated Tax Payments For 2024

Amount - Federal	Date Paid	State	Amount - State	Date - Paid
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Electronic Banking Information

Type of Account:	<input type="text"/>
Financial Institution:	<input type="text"/>
Routing Number:	<input type="text"/>
Routing Number:	<input type="text"/>

Tax Payer:

Based on your responses in the questionnaire above, please provide us with the following documents and information:

- 1b. Please upload a copy of your prior year tax return.
- 4b. Please upload all tax documents for your dependent's tax return.
- 5. Please upload all W-2's.
- 6. Please upload all 1099-DIV, and any brokerage account 1099 for accounts not managed by EYS.
- 7. Please upload all Social Security statements (Form SSA-1099).
- 8. Please upload all retirement account distributions/rollovers (Form 1099-R).
- 9. Please upload all your gambling income.
- 10. Please upload all rental income and expenses PER property, including any tax forms received for the income and expenses.
- 12b. Please provide the total interior square footage of your home and the square footage of the portion of your home used EXCLUSIVELY for business purpose
total Squire Footage: Business Squire Footage:
- 12c. Please provide the total mileage driven and the total business mileage driven.
Total mileage: Business mileage:
- 12d. Please provide the amount you paid out of pocket for health insurance premiums.
Health insurance:
- 12e. Please provide the amount you'd like to contribute to your self-employed retirement account for 2024 (or indicate MAX to have EYS calculate the maximum allowable contribution).
Already contributed: Additional contribution: Max:
- 13a. Please upload the seller's closing statement and original buyer's closing statement, along with any tax forms received pertaining to the sale of the home.
- 13b. Please provide the amount of improvements made to the property.
Improvements:
- 14. Please upload any other income you received, including the relevant tax documents.
- 15. Please upload the amount of mortgage interest (Form 1098) as well as the amount of property taxes paid during 2024.
- 16. Please upload the cash and non-cash charitable contributions during 2024.
- 17. Please upload the personal property taxes paid during 2024.
- 18. Please provide the amount of medical expenses paid out of pocket during 2024.
Prescriptions:
Doctors & Dentists:
Hospitals & Nursing Homes:
Long-term Care Premiums:

Tax Payer:

Based on your responses in the questionnaire above, please provide us with the following documents and information:

- 19. Please upload the amount of student loan interest (Form 1098-E) or education expenses (Form 1098-T) paid during 2024.
- 20. Please provide the amount already contributed and the amount you'd like to contribute to a traditional IRA for 2024 (or write MAX to have EYS calculate the maximum allowable contribution).
Already contributed:
Additional contribution: Max:
- 21. Please provide the amount contributed/you'd like to contribute to a Roth IRA for 2024 (or write MAX to have EYS calculate the maximum allowable contribution).
Already contributed: Additional contribution: Max:
- 22. Please provide the amount you'd like to contribute outside of your W-2 to an HSA for 2024 (or write MAX to have EYS calculate the maximum).
Already contributed: Max:
- 23. Please upload any additional information relating to any other deductions to which you may qualify for 2024.
- 24. Please upload the make, model, year, and VIN number for the electric vehicle purchased during 2024.
- 25. Please upload the total cost of solar panel/electric vehicle charging station installation during 2024.
- 26. Please upload the cost of childcare per dependent, including the name, address, and tax ID of the provider.
- 27. Please upload additional information relating to any other credits you think you may qualify for during 2024.
- 31. Please provide additional information relating to where and when you moved during 2024.

- 36. Please provide additional information relating to the gift and recipient during 2024.

Tax Payer:

Based on your responses in the questionnaire above, please provide us with the following documents and information:

37. Please provide/upload any additional information you think would be helpful in preparing your tax returns.

Date

Date

***To submit the form scroll down and click "SUBMIT" button.**

This page contains submit button, Please press it to submit form.

