

2025 1040 US Tax Organizer

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Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2025 tax return. Please enter all pertinent 2025 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

CLIENT INFORMATION

Taxpayer

Spouse

Form with fields for Client Information: First name and initial, Last name, Title/suffix, Social security number, Occupation, Date of birth, Date of death, 1=blind, Home phone, Work phone, Work extension, Cell phone, E-mail address.

Address

In care of, Street address, Apartment number, City, State, ZIP code

DEPENDENTS

Dependent No.

Dependent No.

Form with fields for Dependents: First name, Last name, Title/suffix, Date of birth, Date of death, Date of adoption, Social security number, Relationship, Months lived at home.

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Form with fields for Dependents: First name, Last name, Title/suffix, Date of birth, Date of death, Date of adoption, Social security number, Relationship, Months lived at home.

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Please enter all pertinent 2025 information. If you have attached a government form for an item, check the box and do not enter a 2025 amount.

WAGES, SALARIES AND TIPS

Employer name: [grid] 2025 Amount 2024 Amount Attach Forms W-2

INTEREST INCOME

Payer name: [grid] Attach Forms 1099-INT

DIVIDEND INCOME

Payer name: [grid] Attach Forms 1099-DIV

PENSIONS, IRA AND GAMBLING INCOME

Payer name: [grid] Attach Forms 1099-R & W-2G Winnings not reported on W-2G Total gambling losses

OTHER GOVERNMENT FORMS - INCOME

[grid] Form 1099-B - Sales of stock (also include transaction history) Form 1099-MISC - Miscellaneous income Form 1099-K - Merchant card and third party network payments Form 1099-S - Sales of real estate (also include closing statements) Attach Forms 1099

[grid] Form 1099-G - State tax refunds Attach Forms 1099

Taxpayer: [grid] Form SSA-1099 - Social security benefits Form 1099-G - Unemployment compensation Form 1099-Q (529 Plan) Form 1099-QA/5498-QA (ABLE Accounts) Attach Forms 1099

Spouse: [grid] Form SSA-1099 - Social security benefits Form 1099-G - Unemployment compensation Form 1099-Q (529 Plan) Form 1099-QA/5498-QA (ABLE Accounts) Attach Forms 1099

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MISCELLANEOUS INCOME

Taxpayer: Alimony received
Spouse: Alimony received

Other:

Table with 2 columns for 2025 and 2024 amounts.

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer: Traditional IRA contributions (1=maximum)
Roth IRA contributions (1=maximum)
Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)
Spouse: Traditional IRA contributions (1=maximum)
Roth IRA contributions (1=maximum)
Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)

Table with 2 columns: 2025 Amount, 2024 Amount.

OTHER GOVERNMENT FORMS - DEDUCTIONS

- Form 1098-E - Student loan interest
Form 1098-T - Tuition and related expenses

Attach Forms 1098

AFFORDABLE CARE ACT

- Form 1095-A - Health Insurance Marketplace Statement

Attach Forms 1095

ADJUSTMENTS TO INCOME

Taxpayer: Self-employed health insurance premiums
Educator expenses
Other adjustments to income:

Table with 2 columns for 2025 and 2024 amounts.

Alimony paid - Recipient name & SSN

Table with 2 columns for 2025 and 2024 amounts.

Spouse: Self-employed health insurance premiums
Educator expenses
Other adjustments to income:

Table with 2 columns for 2025 and 2024 amounts.

Alimony paid - Recipient name & SSN

Table with 2 columns for 2025 and 2024 amounts.

MEDICAL AND DENTAL EXPENSES

Prescription medicines and drugs
Doctors, dentists and nurses
Hospitals and nursing homes
Insurance premiums
Long-term care premiums - taxpayer
Long-term care premiums - spouse
Insurance reimbursement
Out-of-pocket lodging and transportation expenses
Number of medical miles
Other:

Table with 2 columns for 2025 and 2024 amounts.

TAXES PAID

State income taxes - 1/25 payment on 2024 state estimate

Table with 2 columns for 2025 and 2024 amounts.

