TAX DEDUCTION LOCATOR & IRS TROUBLE MINIMIZER

YOUR TAX APPOINTMENT

Please complete and sign this organizer prior to your appointment.

Please call to schedule your appointment. Try to call early before the calendar is booked up.

Please mail the completed organizer along with the requested information to this office prior to your appointment.

Please mail the completed organizer along with the requested information to this office so the return can be prepared by correspondence.

Your tax appointment is scheduled for:

Day:	
Date:	
Time:	
Office Appointment	Virtual Appointment

APPRECIATED If you know someone who would like a tax appointment, please

REFERRALS ARE ALWAYS

have them call this office. Do not be concerned that your business, personal or financial matters will be discussed with clients whom you refer. All client information is treated in the utmost confidence.

Office Appointment Virtual Appointment
Please notify this office promptly if you are unable to keep this appointment.

IF YOU ARE A NEW CLIENT, BE SURE TO PROVIDE A COPY OF LAST YEAR'S TAX RETURN.

SAVE TIME - READ THIS FIRST

This organizer is designed to assist and remind you of information that is needed to prepare your tax return. The goal is to not overlook anything so you can maximize your legal deductions, comply with government reporting requirements, and avoid problems with the IRS after the return is filed.

Taxes are complicated and the rules change constantly. This organizer was designed specifically for the 2024 tax year and certain items may not apply to other years. Although care has been taken to accommodate most taxpayers' needs, please note questions that are related to issues not included here under "Questions You May Have" in Section D6.

Section Categories

To help you collect your information quickly, this organizer is organized into five general areas. Information required from:

- everyone Sections A1 A13 (Pages 2 & 3)
- business owners Pass-through deduction -Section D1 (Page 4).
- those who have relocated (military only), sold their home, made home energy improvements, or have debt relief income -Sections D2 - D6 (Page 4)

The instructions provided in the header of each section will help you determine if you are required to complete the information in that section.

If you paid foreign taxes (entered at Sections A10 or A11) and are a partner in a partnership or a shareholder in an S-Corporation, it is important that you so notify whoever is responsible for the entity's tax returns.

Before proceeding, please take a moment to review the purpose of the SPECIAL MARKERS used throughout this organizer.



Your tax information from the prior year is automatically transferred to this year's tax return. Therefore, not all taxpayer data and contact info needs to be recorded. The marker signifies that returning clients need only enter data in that section if it has changed since the prior year or if there is new information.



This marker notes areas where the IRS can match the entry in their computer and incomplete or incorrect information can trigger government correspondence or, worse yet, an office audit. Pay particular attention to sections or individual entries with this symbol.



This flag symbol denotes areas where a deduction or item of income is to be treated differently when computing the alternative minimum tax (AMT). The AMT is another way of computing your tax liability, which applies more restrictive limits on certain deductions and preference income. If higher than the regular tax, the AMT applies.



This marker indicates payments that may require the issuance of a 1099 if, in the course of a trade or business (including most rentals), the annual amount paid to an individual is \$600 or more. Failure to file 1099s can lead to a loss of the tax deduction for that expense and failure to timely file the forms with the IRS and furnish copies to payees can result in substantial penalties.

A - TAXPAYER INFORMATION The information on this page is required for every taxpayer. Please review each section on this page and report items that are applicable to you, your

spouse or dependents.

A1 - TAX						€.	<u>_</u> →	A6 - IN	COME	& ADJ	USTM	ENTS 🖯	You	Spouse	
Returning clients: e	nter firs	t and last n	ame of filer an	d any changes or	nly.			W-2 Wages – P	lease provide	W-2 Forms (re	etain copy "C	" for your records)			
Filer Name (Must Match SS Admin)	9	Birthday			day /			rship, Trust or S-Corporation K-1s (provide complete K-1 copies) a rou the beneficiary of an inheritance? If so, please verify with					sued		
Social Security No			Occupation			executor or trustee if you will be receiving a K-1.			a K-1.		Yes	Yes			
(and IRS IP-PIN if issued	d)				ļ			State Tax Refun							
Driver's Licence (D	DL)			State			Social Security or RR income (provide SSA-1099 or RRB-1099) Pension Income (provide all 1099-Rs) - enter IRA distributions in A7								
DL Issued Date		/ / DL Expires / /			Alimony Receiv										
Contact Phone			Day Evening Alimony Paid (provide name and SSN below)												
Email Address							Paid to:								
Spouse Name	θ			Birth	<u> </u>		Tips (not includ								
(Must Match SS Admin)	•			/		Unemployment			99-G)						
Social Security No	o. 😌 🛛			Occupation				Gambling Winnings (provide W-2Gs)							
(and IRS IP-PIN if issued	d)			Occupation				A7 - IRA & RETIREMENT PLANS 🤤		You	Spouse				
Driver's Licence (D	DL)				State			Retirement plan with your employer?		🗆 Yes	C Yes				
DL Issued Date		/	/	DL Expires	/	/		Did you or your spouse convert a traditional IRA to a Roth IRA in 2024?		oth IRA in 2024?	🗆 Yes	🗆 Yes			
Contact Phone					Day	y Even	ing	Traditional	Contribution	15					
Email Address					Le	egally Blin	d	IRA, Keogh	Withdrawals	5 (1099-R) ⁽¹⁾					
					1			& SEP	Rollovers ⁽²⁾⁽³⁾)					
A 2 - A D D Returning clients ca			excent for cha	nnes		- ₿ 4	_ →	Plans	Basis (Total of your prior year		non-deductible	e contributions)			
Street		ins section							Contribution						
				Apt/Unit N				Roth IRA	Withdrawals Rollovers ⁽²⁾⁽³⁾	. ,					
City				State	2	^Z ip		(1) Show reason if			eported even i	if not taxable unless o	lirectly "tran	sferred"	
Home Phone Num	nber (if a	different from	above)					(3) Rollovers from							
A3 · STAT				<u>OR 202</u>	<u>4</u>			A8 - 51	PECIAI	QUES	TION	S & INFO			
Check any that appl	ty and er	nter the effe						Coverdell Educa		Contribution	, , , , , , , , , , , , , , , , , , ,	Distribution - provid			
Married	/	/	Move	d		/ /		Sec 529 Tuition	Plan	Contribution		Distribution - provid	le 1099-Q		
Separated	/	/	Home	e Sold		/ /		HSA Contribution other than via employer Distribution - provid		le 1099-SA					
Divorced	/	/	Spou	se Deceased		/ /		Adoption Expenses Special Needs Child Educator Expenses							
Retired	/	/ Dependent Deceased /		/ /		CAUTION – There are severe penalties with failing to report an interest in or sig foreign bank account. Call our attention to any foreign accounts, dealings						rity over a			
A4 - ESTI	MAI	FED T	AXES F	PAID		(₿					OUR SPOUSE)			
This office cannot as	sume tha	at all estima	ted taxes were	paid as originally								ership interest in a			
time. Therefore, pleas Incorrect amounts wi								Have sign				of state or similar wner on a bank acc			
Payment & Due D	ate		Date Paid	Federal		State				ds are not you				loreigii	
Applied from Last		Refund						Received	an inheritanc	e from someo	ne in a forei	gn country.			
First Quarter (Apri			/ /					Have a foreign bank account (o			unt (over \$10,000 at any time in 2024)				
								Received a distribution from, or were the grantor, or transferor to, a			foreign tru	ust			
Second Quarter (J		,						At any time during the year hold an interest in a foreign financial asse			:				
Third Quarter (Sep	. ,	,	/ /					Receive, sell, exchange or otherwise acquire a financial interest in the year.		ligital asse	ts during				
Fourth Quarter (Ja	an. 15, 2	2025)	/ /						a Oualified O	pportunity Fur	nd during the	e vear			
A5 - REFU	UND	DIRE	CT DE	POSIT						come Credit b					
Complete this section Doing so will speed							t.					ar Amarican Onna	aturaitu Cara		
stolen. Direct depos				-	-							, or American Oppo		an	
account are provide additional account i						vide the						lease call in advan			
Bank Name	monnat				na.			Made a g joint gifts	by a married	l couple) in 20	any individua 24	al in excess of \$18	,000 (\$36,0	UUU for	
								Employ h	ousehold woi	rkers					
Bank Routing Nun								Sold jewe	elry, gold, coin	is, or other pre	cious metals	s during the year			
Account Number ((include h	yphens - omit	t spaces & specia	l characters – 17 di	gits max)			Received	Form 1099-K	- Explain sou	rce of income	e:			
							<u>c</u> :	🗌 Filer 🗌	Spouse	You wish to c	ontribute to	the Presidential ca	impaign fu	ind	
Account Type	C	hecking	Saving	gs Allocat	ion:		%								

A - TAXPAYER INFORMATION The information on this page is required for every taxpayer. Please review each section on this page and report items that are applicable to you, your



Last Name		Seciel Sec.	n Munak 🔒	S, D, F	MG	Months in	Home				lf ov	er the	age of 18
First Name	First Name (If Different)		Social Security Number 😌 (and, if issued, IRS IP-PIN) (Mandatory)			(Your Hoi		Birth Date				Student	
								/	/				☐ Yes
								/	/				🗆 Yes
								/	/	,			☐ Yes
Enter S-Son, D-Daugh	ter, F-Father, M-Mother, G	G-Grandchild, or enter	other relationsh	ip. Enter H(OH for non	-dependent H	Head of Ho	ousehold	qualifiers	5.			
10 - INTE	REST INCO	ME						Caution:	All intere	est must	be reported	l even i	f tax-free!
RS matches payer and	I amount. Always use the	payer name listed o	n 1099 even if no	t the origir	al source.								
Name o Please provide all form	of Payer s 1099INT and 1099OID	Banks, Credit Union, Corp Bonds Seller Financed	ces Paid held		g Bonds, T-Bills		Home	Home State Municipal Bonds			Other State (Federal Tax-Free)		
(Entries are not needed when 1099s are provided)		Mortgages, etc.		lietu	(Star		e Tax-Free)		(Generally Tax-Free)		2) (Federal		
orfeited Interest (ea	rly withdrawal penalty)		·		Federal	Tax Withold	ding on I	nterest &	& Divide	ends			
		Noto: So	Selle	er Finance			of the nave	r					
ayer Name:		SSN		iges require i	Address	1	or the paye						
	l amount. Always use pay		199 even if not th									d in cor	· · · · · · · · · · · · · · · · · · ·
he various types of div	vidends. Please bring bro			e original s	ource. Son	ne institutions	s use subs	stitute 109	99s and c	aution II	nust be used	u ili set	Jarating
				e original s	ource. Son	ne institution:	s use subs	stitute 109	99s and c		nust be used	a in set	-
Please provide	of Payer all forms 1099DIV when 1099s are provided)	oker statements. Foreign Taxes Paid or Withheld	Ordinary Dividends	e original s Qualifi Dividen	ed	Capital Gains	s use subs 199 Divide	PA	99s and o Source Obligatio	U.S.	Taxable State Or	to	-
Please provide	of Payer all forms 1099DIV	Foreign Taxes Paid	Ordinary	Qualifi	ed	Capital	199	PA	Source	U.S.	Taxable	to	Non-Taxab State &
Please provide	of Payer all forms 1099DIV	Foreign Taxes Paid	Ordinary	Qualifi	ed	Capital	199	PA	Source	U.S.	Taxable	to	Non-Taxab State &
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D - BUSINESS DEDUCTION, RELOCATION, HOME SALE, DEBT RELIEF, ENERGY CREDITS



D1 - SEC 199A DEDUCTION Income passed through from a business activity via a K-I m deduction.	nay qualify for a special tax	D4 - MOVING DEDUCTIONS For federal for years 2018 - 2025, allowed only for active duty members of the Armed Forces who move pursuant to a military order. There are no distance requirements for military change of station.						
The information needed to compute this deduction is includ K-1 statement where the business income or loss is from pa and trusts Please be sure to provide the supplemental state	rtnerships, S-corporations	Check if employer reimbursed any amount of moving expense or home sale assistance and provide the reimbursement statement from the employer (Form 3903 or a substitute statement)						
you've received.	5 ,	A - Miles from Old Residence to New Job m						
D2 - HOME SALE		B - Miles from Old Residence to Old Job m						
If you sold your home, abandoned it, or lost it to foreclosure,	the disposition may need to be	A minus B – if less than 50 miles, stop: no deduction allowed mi						
reported. If you received a 1099-S, it is very important that you the home or lost it to foreclosure, see Section D5.		Commercial Mover Temporary Storage (up to	Truck Rental					
CHECK ALL BOXES THAT APPLY		30 days)	meals)					
Address of Home Sold		Trailer Rental Rental Fuel Costs	Highway Tolls Airfare					
Date Purchased	/ /	# of owned vehicles driven						
Purchase Price (please provide purchase escrow statement)		to new home	Auto Travel	miles				
You deferred gain from a home sale made prior to 5/7/2 Form 2119 for the year of sale.	1997. If so, please provide the	Boxes/Tape/Supplies	Other:					
Improvements to Home Sold (not maintenance)(provide list)		D5 - DEBT REL	IEF & FORECLOSURE					
Date of Sale (Please bring FINAL closing escrow statement. This	/ /	If you had debt totally or partial	ly forgiven, you may be required to report de					
Sales Price document will have the information needed for			ges, credit card debt, vehicle loans, etc. Debt student loans are not included. Please call t					
Sales Expenses these entries.)		advance to discuss what addition	nal documentation may be required.					
You owned and used the home as your primary residence (counting back from the sale date)	ce for two of the prior five years	CHECK ALL THAT APPLY						
Your spouse (if married) owned and used the home as h two of the prior five years	is/her primary residence for	You had any amount of credit card debt forgiven and provide a copy of the 1099-C you received from the financial institution						
If owned and used less than two years, give reason for sale:		You abandoned your home and provide a copy of the 1099-A and/or the 1099-C you received from the financial institution (also complete Section D2 home sale information)						
If the home was ever used for business (such as a renta center)	l, home office or day care	Your home was foreclosed upon or you sold it under a "short sale" agreement with the lender and provide a copy of the 1099-A and/or the 1099-C you received						
Any of the business use in the prior question was befor	e 5/7/97							
The home was acquired by tax-deferred (Sec 1031) excl	nange after 10/22/04	If you need more space please ir						
You (and spouse if married) have excluded gain from th within two years of the date of sale of this residence	e sale of a prior residence	n you need more space please in						
The home was inherited (including from a deceased spo	ouse)							
The home was not used as your primary residence for a	ny period after 2008							
You claimed the first-time home buyer credit in 2008								
D3 - ENERGY CREDITS Enter only items certified by the manufacturer to meet Gover	nment energy standards.							
Did you have solar electric or solar water heating instal home in 2024?	lled on your main or second							
Did you pay for an energy audit of or make energy savir home in 2024?	ngs improvements to your main							
Did you purchase a new or previously-owned electric ve	ehicle in 2024?							
If you entered a written binding contract between Janu. 16, 2022, to purchase a new EV and placed that vehicle Clean Vehicle Seller's Report from the dealer is required	in service in 2024, form 15400							
D8 • SIGNATURE To the best of my knowledge, all the information contained w	vithin this document is true, correc	t and complete.						
	/ /			/ /				

Filer Signature

Date

Spouse Signature

Date