

2024 Tax Organizer

| | | | |
|---|---------------|------------|-----|
| Name | Date of Birth | Occupation | SSN |
| Spouse Name | Date of Birth | Occupation | SSN |
| Phone | Email | | |
| Address (as of 12/31/24) | | | |
| Mailing Address (if different than above) | | | |

Filing Status

- Single
 Married Filing Jointly
 Married Filing Separately
 Head of Household
 Qualified Widow(er)
 Unsure

| Dependents Name (not spouse) | Date of Birth | SSN | Number of months lived with you in 2024 |
|------------------------------|---------------|-----|---|
| | | | |
| | | | |
| | | | |

Tax Document Checklist
(bring all that apply)

- Last Year's Tax Return (New Client's Only)
 Identity Protection Pin (IP PIN)
- W-2
 1099-DIV/INT
 Property Tax Statements
 1095-A (MNSure)
 1099-R
 1098 (Mortgage Interest/Tuition)
 K-1 (Partnerships/Corp/Estate)
 1099-G
 License Plate Tab Receipts
 Social Security Tax Statement
 1099-SA
 K-12 Education Receipts
 IRA Year End Statements
 1099-MISC
 Driver's License
 MN Form CRP
 1099-K

Questionnaire

| Did you Pay Estimated Taxes? | Fed | State |
|--|-----|-------|
| 1 st Quarter | \$ | \$ |
| 2 nd Quarter | \$ | \$ |
| 3 rd Quarter | \$ | \$ |
| 4 th Quarter | \$ | \$ |
| Refund Applied from Last Year's Return | \$ | \$ |

| Did you contribute to an IRA? (not through your employer) | You | Spouse |
|--|-----|--------|
| Traditional IRA | \$ | \$ |
| Roth IRA | \$ | \$ |
| SIMPLE IRA | \$ | \$ |
| SEP IRA | \$ | \$ |
| Rollover money from Traditional to Roth | \$ | \$ |

| Did you receive/pay Alimony? | Received | Paid |
|-------------------------------------|----------|------|
| | \$ | \$ |
| Name of Payor/Recipient | | |
| Social Security Number | | |
| Date of Divorce | | |

| Did you donate to a Charity? | Amounts |
|-------------------------------------|---------|
| Name of Charity/Organization | |
| | \$ |
| | \$ |
| | \$ |

| Did you contribute to 529 College Savings? | | | |
|---|--------------------|-----------|--------|
| Beneficiary Name | Investment Company | Account # | Amount |
| | | | \$ |
| | | | \$ |
| | | | \$ |

Check all that applied for 2024:

- Self-employed
- Married/Divorced
- Owned Property in Foreign Country
- Sold Real Estate
- Self-Insured
- Contributed to HSA
- New or Refinanced Mortgage
- Birth/Adoption
- Filing Other State Tax Besides MN
- Home Equity Loan
- Money from Trust
- Back-door Roth Contribution
- Paid Long-Term Care Premiums
- Contribute to 529
- Tracked Medical Expenses
- Received Unemployment Benefits
- Disability Payments
- Exercised Stock Options
- Rollover/Conversion from Retirement Account
- Purchased an Electric Vehicle
- Bought/Sold Digital Currency
- Energy improvements to your home

| Check Yes or No for the following | | | | |
|---|-----|----|--------|----|
| | Me | | Spouse | |
| | Yes | No | Yes | No |
| Designate \$3 to Presidential Campaign Fund (Does not increase your tax) | | | | |
| Designate \$5 to the MN State Campaign Fund (Does not increase your tax) *Please indicate party below | | | | |
| *Me: <input type="checkbox"/> Republican <input type="checkbox"/> DFL <input type="checkbox"/> Libertarian <input type="checkbox"/> General Fund <input type="checkbox"/> Other | | | | |
| *Spouse: <input type="checkbox"/> Republican <input type="checkbox"/> DFL <input type="checkbox"/> Libertarian <input type="checkbox"/> General Fund <input type="checkbox"/> Other | | | | |
| Donate to the MN Non-Game Wildlife Fund? (this will increase or decrease your refund) | | \$ | | \$ |

Any comments or other information you want your tax-preparer to know?
