

SOUND

NW TAX SERVICES

Client Tax Organizer

Please complete this Organizer before your appointment.

1. Personal Information

Name	Soc. Sec. No.	Date of Birth	Occupation	Cell Phone
Taxpayer:				
Spouse:				
Email Address(es):				
Driver's License Number:	State:	Issue Date:	Exp. Date:	
Home Street Address	City	State	ZIP	Home Phone

Taxpayer

Spouse

Marital Status

Blind Yes No
 Yes No
 Married Will file jointly Yes No
 Disabled Yes No
 Yes No
 Single
 Pres. Campaign Fund Yes No
 Yes No
 Widow(er), Date of Spouse's Death _____

2. Dependents (Children & Others)

Name (First, Last)	Relationship	Date of Birth	Soc. Sec. No.	Months Lived with You in Tax Year	Disabled	Full- Time Student	Dependent's Gross Income

Please answer the following questions to determine maximum deductions.

- | | |
|--|--|
| <p>1. Are you self-employed or do you receive hobby income? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>2. Did you receive rent from real estate or other property? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>3. Do you own crypto currency? If so, and you had any related transactions during 2024, please provide 1099 or 8949. <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>4. Do you have a foreign bank account, trust, or business? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>5. Do you provide a home for or help support anyone not listed in Section 2 above? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>6. Were there any births, deaths, marriages, divorces, or adoptions in your immediate family? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>7. Did you give a gift of more than \$18,000 to one or more people? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>8. Did you have any debts canceled, forgiven, or refinanced? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> | <p>9. Did you pay interest on a student loan for yourself, spouse, or dependent during the year? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>10. Did you pay expenses for yourself, your spouse, or your dependent to attend classes beyond high school? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>11. Did you have a household employee? (Please provide W2 and Sch. H.) <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>12. Did you have health insurance through the Health Exchange? (If yes, please provide 1095-A.) <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>13. Did you have any children under the age of 19 or 19- to 23-year-old students with unearned income of more than \$2,600? <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>14. Did you purchase a hybrid or electric vehicle? (Please provide receipt.) <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>15. Did you install any energy property to your residence, such as solar water heaters, generators, or fuel cells, or energy efficient improvements, such as exterior doors or windows, insulation, heat pumps, furnaces central air conditions, or water heaters <input type="checkbox"/> Yes* <input type="checkbox"/> No</p> |
|--|--|

3. Wage, Salary Income

Attach W2s

Employer	Taxpayer	Spouse
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

4. Interest Income

Attach 1099-INT, form 1097-BTC, and Broker Statements

Payer	Amount

5. Dividend Income

From Mutual Funds & Stocks; Attach 1099-DIV

Payer	Ordinary	Capital Gains	Non-Taxable

6. Partnership, Trust, Estate Income

List payers of partnership, limited partnership, S-corporation, trust, or estate income; Attach K-1

7. Property Sold

Attach 1099-S and closing statements

Property	Date Acquired	Cost & Imp.
Personal Residence*		
Vacation Home		
Land		
Other		

*Provide information on improvements, prior sales of home, and cost of a new residence.

8. I.R.A. (Individual Retirement Account)

Contributions for tax year income:

	Amount	Date	✓ for Roth
Taxpayer			
Spouse			

Distributions; Attach 1099-R and 5498

Amount	Reason for Withdrawal	Reinvested?
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

9. Pension, Annuity Income

Attach 1099-R

Amount*	Reason for Withdrawal	Reinvested?
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

*Provide statements from employer or insurance company with information on cost of or contributions to plan.

Did you receive:	Taxpayer	Spouse
Social Security Benefits	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Railroad Retirement	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Attach SSA 1099, RRB 1099

10. Investments Sold

Stocks, Bonds, Mutual Funds, Gold, Silver, Partnership Interest; Attach 1099-B and confirmation slips

Investment	Date Acquired / Date Sold	Cost	Sale Price
	/		
	/		
	/		
	/		

11. Other Income

List all other income, including non-taxable.

Alimony Received (Date of Divorce: _____)	
Child Support	
Scholarships and Grants	
Unemployment Compensation (repaid)	
Prizes, Bonuses, Awards	
Gambling, Lottery (expenses _____)	
Unreported Tips	
Director / Executor's Fee	
Commissions	
Jury Duty	
Worker's Compensation	
Disability Income	
Veteran's Pension	
Payments from Prior Installment Sale	
State Income Tax Refund	
HSA Distribution	
Other: _____	
Other: _____	

12. Medical/Dental Expenses (Out of Pocket)

Medical Insurance Premiums (paid by you)	
Prescription Drugs	
Insulin	
Glasses, Contacts	
Hearing Aids, Batteries	
Braces	
Medical Equipment, Supplies	
Nursing Care	
Medical Therapy	
Hospital	
Doctor / Dental / Orthodontist	
Medical Miles	

13. Taxes Paid

Real Property Tax (attach bills)	
Vehicle Registration (RTA only)	
Other: _____	

14. Interest Expense

Mortgage Interest paid (attach 1098)	
Interest paid to individual for your home (include amortization schedule)	
Paid to:	
Name _____	
Address _____	
Soc. Sec. No. _____	
Investment Interest	

15. Casualty/Theft Loss

(Federally Declared Disaster)

For property damaged by storm, water, fire, accident, or stolen:
Location of Property _____

Description of Property _____

	Other	Federally Declared Disaster Losses
Amount of Damage		
Insurance Reimbursement		
Repair Costs		
Federal Grants Received		

16. Charitable Contributions

Church	
United Way	
Scouts	
Telethons	
University, Public TV/Radio	
Heart, Lung, Cancer, etc.	
Wildlife Fund	
Salvation Army, Goodwill	
Other: _____	
Non-cash: _____	
Charitable Miles	

17. Child & Other Dependent Care Expenses

Also complete this section if you receive dependent care from your employer.

Name of Care Provider	Address	Soc. Sec. No. or Employer ID	Amount Paid

18. Job-Related Moving Expenses

Military Only

Date of Move: _____	
Move Household Goods	
Lodging During Move	
Travel to New Home (number of miles)	

19. Estimated Tax Paid

Date Paid	Federal Amount	State Amount

20. Other Deductions

Alimony Paid to: _____ Soc. Sec. No. _____ Amount: _____	
Student Interest Paid	
Health Savings Account Contributions	
Archer Medical Savings Account Contributions	
Educator Expenses	

21. Education Expenses

Student's Name	Type of Expense	Amount

22. Questions, Comments & Other Information

To the best of my knowledge, the information enclosed in this Client Tax Organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Taxpayer Signature

Date

Spouse Signature

Date

After completing and signing form, please save and upload to our portal. For an invitation to the portal or any questions, please email: justin@soundnwtax.com