

Tax Time LLC - Roger Nickell CPA

2024 Individual Taxpayer Organizer

*** IMPORTANT ***

Electronic REQUIRES
Download and Save As
to Save Entered Data

1 Victory Drive, Suite 101,
Liberty, MO 64068
816-305-5873
Admin@taxescpa.com
https://taxescpa.com

Existing Clients (Prepared Prior Year Return)

- Confirm items have NOT Changed
- Complete Pages 2 and 3

Confirm/Check No Changes to list below:

Address Marital Status

Phone E-Mail

Dependents Bank Account

New Clients

- Complete All Information below & Page 2 & 3
- Copy of Prior Year Tax Return
- Copy of Drivers License

Please note that any information **not complete or provided** could **delay** the processing of your Income Tax Return.

Providing and Sharing Information

Electronic Client Folder on Secure Client Portal to share and review documents electronically and provide Tax Returns and Information. (Required for Electronic Copies & Documents)

Accept use of Electronic Folder

Initials

Income Tax Return Copy Preference

Electronic Copy

Paper Copy

Taxpayer				SSN-Tax ID	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email	IP PIN	
Occupation	Date of birth		Are you new to our firm? Yes No		
Address	City		State	Zip	
County	Primary phone		Secondary phone		
Driver's License No.		State	Issue Date	Exp. Date	

Spouse				SSN-Tax ID	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email	IP PIN	
Occupation	Date of birth		Are you new to our firm? Yes No		
Address <small>(If different from Taxpayer)</small>	City		State	Zip	
County	Primary phone		Secondary phone		
Driver's License No.		State	Issue Date	Exp. Date	

If you moved during 2024 enter your previous address.	Date of move
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Marital status at 12/31/24: Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure
 Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No
 Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.
 Have you received any notice from the IRS or state revenue department within the past year? Yes No

Names of dependent children <i>Child's full name</i>	SSN-Tax ID # *	IP PIN	Date of birth mm/dd/yyyy	Months lived in home in 2024	Relationship to taxpayer	College student?

Did any of the children have unearned income above \$1,300 in the year? Yes No Do any of the children have a disability? Yes No
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2024? Yes No

Other dependents or people who lived with you						
Name	SSN-Tax ID # *	IP PIN	Date of birth mm/dd/yyyy	Months lived in home in 2024	Relationship	Income

Bank information: Use for	Direct deposit of refund	Direct debit of balance due	Name of bank
Checking	Savings	Routing transit number	Account number

*A Tax ID # is either a Social Security Number (SSN), adoption taxpayer identification number (ATIN), or an individual taxpayer identification number (ITIN).

Questions — All Taxpayers *(Provide related amounts, statements or other documentation as needed)*

“You” refers to both taxpayer and spouse

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind? You _____ Spouse _____			
	Yes	No	Did you pay or receive alimony in 2024? <i>Paid Received</i> \$ _____		Recipient's SSN	Date of divorce or separation
	Yes	No	Did you have health insurance ? Employer ___ Medicare/caid ___ Healthcare.gov(Public Exchange)___ (Provide 1095A) Other ___			
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement? _____			
	Yes	No	Did you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home? _____			
	Yes	No	Did you purchase a new energy-efficient car, truck, or van ? Provide Purchase Amount and Agreement, Make, Model, Year			
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?			
	Yes	No	Are you a member of the military?		State of residency	
	Yes	No	Were you a citizen of or lived in a foreign country?		Foreign country	
	Yes	No	Did you receive a 1099-K ? ___ Sale Personal Items (i.e. Ebay) ___ Business Did you receive gambling income, W2G? ___ \$ _____			
Yes	No	Do you own or have financial interest in a foreign bank or financial account? <i>Maximum value in 2024</i> \$ _____				
CHILDREN & EDUCATION	Yes	No	Would you like to allow your tax preparer to discuss your return with the IRS?			
	Yes	No	Were any children born or adopted in 2024? <i>(Provide statement for other expenses.)</i>			
	Yes	No	Were any children attending college? <i>(Provide Form 1098-T and 1098-E)</i>			
			Year in college	Paid by you: Tuition \$	Student loan interest \$	Books \$
			Paid by student: Tuition \$	Student loan interest \$	Books \$	
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?			
			Student	Name and address of school		Amount paid \$
	Yes	No	Did you pay for child or dependent care so you could work or go to school? <i>(add statement if needed)</i>			
			Name of provider	Address		EIN or SSN Amount paid \$
	Yes	No	Do you have any children who have unearned income of \$1,300 or more? Provide investment statements			
Yes	No	Did you make any contributions to a 529 plan in 2024? MUST Provide Statement and/or Amount \$ _____				
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2024? Amount \$ _____		Traditional IRA	Roth IRA
	Yes	No	Did you roll over any amounts from a retirement account in 2024? Direct Rollover ___ 1099-R ___			
	Yes	No	Did you sell or transfer any stock or sell rental or investment property? Provide Investment Statements-Documentation			
	Yes	No	Did you receive any income from an installment sale?			
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2024?			
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2024?			
Yes	No	Buy/Sell Virtual Currency (i.e. Bitcoin) ? Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?				
DEDUCTIONS	Yes	No	Did you have an HSA? Employer ___ Pay Ded; Direct ___ Contr \$ _____		Distr \$ _____	Used for Healthcare ___ Provide 1099-SA
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.			
	Yes	No	Did you pay sales taxes on a major purchase in 2024? (i.e. vehicle, boat, etc) Provide Detail and/or Amount \$ _____			
	Yes	No	Did you make any charitable contributions in 2024? Provide details and/or Amount \$ _____			
BUSINESS	Yes	No	Did you work from a home office or use your car for your own business ? If Yes, Provide Square Footage and /or Mileage			
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)? _____			
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?			
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.			
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.			
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.			
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details - Amounts by Description.			
State information Full-year resident Part-year resident Nonresident School district						
States of residence during 2024 and dates					Do you rent or own your home? Rent Own	
					Total rent paid \$	Includes heat? Yes No

Estimated Tax Payments — Tax Year 2024

<i>Installment</i>	<i>Date paid</i>	<i>Federal</i>	<i>Date paid</i>	<i>State</i>
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2023 overpayment?		\$		\$
Total		\$		\$

Tax Preparation Checklist

Please provide the following documentation:

All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.

Form 1095-A (for health insurance purchased through a public exchange), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).

If you are a new client, provide copies of last year's tax returns.

The completed Individual Income Tax Organizer. *Note:* If you choose not to fill out the organizer, you must at least answer the "Yes" or "No" questions under "Questions—All Taxpayers."

Copy of the closing statement if you bought, sold, or refinanced real estate.

Mileage figures for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage.

Detail of estimated tax payments made, if any.

Income and deductions categorized on a separate sheet for business or rental activities.

List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions.

Copy of all acknowledgement letters received from charitable organizations for contributions made in 2024.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.