Tax Time LLC - Roger Nickell CPA
2024 Individual Taxpayer Organizer

Electronic Completion REQUIRES Download and Save As to Save Entered Data

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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	
First Name	*M.I.*	*Last Name*	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	
First Name	*M.I.*	*Last Name*	Email		IP PIN
Occupation		Date of birth		Are you new to our firm? Yes No	
Address *(If different from Taxpayer)*		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

Marital status at 12/31/23: 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 *Child's full name*	*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 $1,250 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 statements or other documentation.)

"You" refers to both taxpayer and spouse—**enter "?" if unsure about a question.**

LIFESTYLE & TAXES	☐ Yes ☐ No	Are either you or your spouse legally blind?
	Yes No	Did you pay or receive alimony in 2024? *Paid* ☐ ☐ *Received* $ — *Recipient's SSN* — *Date of divorce or separation*
	Yes No	Did you purchase health insurance through a public exchange?
	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 in your home?
	Yes No	Did you purchase a new energy-efficient car, truck, or van?
	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	Do you own or have financial interest in a foreign bank or financial account? *Maximum value* $
	Yes No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? *Designee's name* — *Phone number* — *PIN (any five digits)*
CHILDREN & EDUCATION	☐ Yes ☐ No	Were any children born or adopted in 2024? *(Provide statement for other expenses.)*
	Yes No	Were any children attending college? *(Provide Form 1098-T.)*
		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 — *Amount paid* $
		Name and address of school
	Yes No	Did you pay for child or dependent care so you could work or go to school? *(add statement if needed)*
		Name of provider — *EIN or SSN*
		Address — *Amount paid* $
	Yes No	Do you have any children who have unearned income of $1,250 or more?
	Yes No	Did you make any contributions to a 529 plan in 2024? Provide Statement and/or Amount $
INVESTMENTS	☐ Yes ☐ No	Did you, or will you, contribute any money to an IRA for 2024? ☐ Traditional IRA ☐ Roth IRA
	Yes No	Did you roll over any amounts from a retirement account in 2024?
	Yes No	Did you sell or transfer any stock or sell rental or investment property?
	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, or do you plan to, contribute money before April 15, 2024 to an HSA for 2024? If yes, provide details.
	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, such as a vehicle, boat, or home?
	Yes No	Did you make any charitable contributions in 2024? If yes, provide details.
BUSINESS	☐ Yes ☐ No	Did you work from a home office or use your car for business?
	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.

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

Installment	*Date paid*	*Federal*	*Date paid*	*State*
First		$		$
Second		$		$
Third		$		$
Fourth		$		$
Amount applied from 2022 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 late 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.