

If we did your 2023 tax return, do not include 2023 data

You can include copy of your 2023 tax return for 2023 data

2024 TAX ORGANIZER

Taxpayer Information	Spouse Information
Last name	Last name.....
First name	First name
Middle Initial..... Suffix.....	Middle Initial..... Suffix.....
Social security number	Social security number
Occupation	Occupation.....
Work phone Ext ...	Work phone..... Ext ...
Cell phone	Cell phone
E-mail address.....	E-mail address.....
Date of birth.....	Date of birth
Address	Apartment number.....
City	State..... ZIP Code.....
Home phone..... Fax number	

Dependent Information					
First name	MI	Social Security Number	Date of Birth	Months Lived with Taxpayer	Child Care Expense
Last name	Suffix	Relationship			

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

Education Tuition and Fees
 Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid
 Enter total 2024 qualified student loan interest.....

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation		
Employer Name		2023 Amount
_____		_____
_____		_____
_____		_____
Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc		
1099-R Payer Name		2023 Amount
_____		_____
_____		_____
_____		_____
Attach Form(s) SSA-1099 – Social Security/Railroad Benefits		
	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099	_____	_____
Railroad Retirement Benefits from Form RRB-1099	_____	_____
Medicare B premiums withheld	_____	_____
Medicare C premiums withheld	_____	_____
Medicare D premiums withheld	_____	_____
Attach Form(s) 1099-MISC – Miscellaneous Income, 1099-NEC, and 1099-K		
1099-MISC, 1099-NEC, and 1099-K Payer Name		

Attach Form(s) 1099-INT – Interest Income		
1099-INT Payer Name		2023 Amount
_____		_____
_____		_____
_____		_____
_____		_____
Attach Form(s) 1099-DIV – Dividend Income		
1099-DIV Payer Name		2023 Amount
_____		_____
_____		_____
_____		_____
_____		_____
Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc		
Attach all stock sale transaction information, including initial cost information.		
Other Government Forms to attach:		
Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs		
Other Income:		
Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.		
Retirement Plan Contributions		
	Taxpayer	Spouse
Traditional IRA contributions made for 2024	_____	_____
Roth IRA contributions made for 2024	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____

2024 Deductions

Medical and Dental Expenses	2024 Amount	2023 Amount
Prescription medications.....	_____	_____
Health insurance premiums	_____	_____
Doctors, dentists, etc	_____	_____
Hospitals, clinics, etc	_____	_____
Eyeglasses and contact lenses	_____	_____
Miles driven for medical purposes.....	_____	_____
Other medical and dental expenses: _____	_____	_____
Taxes	2024 Amount	2023 Amount
Real estate taxes paid on principal residence	_____	_____
Real estate taxes paid on additional homes or land	_____	_____
Auto license registration fees based on the value of the vehicle	_____	_____
Other personal property taxes	_____	_____
Interest Expenses		
Home mortgage interest paid – Attach Form(s) 1098.		
Lender's Name	2024 Amount	2023 Amount
_____	_____	_____
_____	_____	_____
Points paid on loan to buy, build or improve main home		
Lender's Name	2024 Amount	
_____	_____	
Cash/Check/Credit Contributions	2024 Amount	2023 Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
Noncash Charitable Contributions		
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.		
Miscellaneous Deductions	2024 Amount	2023 Amount
Union and professional dues	_____	_____
Professional subscriptions, books, supplies	_____	_____
Uniforms and protective clothing (including cleaning)	_____	_____
Job search costs	_____	_____
Taxpayer educator expenses.....	_____	_____
Spouse educator expenses.....	_____	_____
Tax return preparation fees	_____	_____
Safe deposit box rental	_____	_____
Gambling losses (to the extent of gambling income)	_____	_____
Other expenses (list): _____	_____	_____

	Yes	No
1 Did a lender cancel any of your debt in 2024? (Attach any Forms 1099-A or 1099-C).....	<input type="checkbox"/>	<input type="checkbox"/>
2 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? If yes , please attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you purchase a motor vehicle or boat during 2024?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , attach documentation showing sales tax paid.		
4 Did you purchase a hybrid or electric vehicle in 2024? If yes , enter year, make, model, and date purchased: _____	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you donate a vehicle in 2024? If yes , attach Form 1098C.....	<input type="checkbox"/>	<input type="checkbox"/>
6 What was the sales tax rate in your locality in 2024? % State ID		
7 Did your marital status change during 2024?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , explain: _____		
8 Were you or your spouse permanently and totally disabled in 2024?	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you have dependents who must file?	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,600? ...	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you provide over half the support for any other person during 2024?	<input type="checkbox"/>	<input type="checkbox"/>
12 Did you incur adoption expenses during 2024?	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	<input type="checkbox"/>	<input type="checkbox"/>
14 Did you receive any disability payments in 2024?	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you receive tip income not reported to your employer?	<input type="checkbox"/>	<input type="checkbox"/>
16 a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2024? If yes , attach closing or escrow statements, 1099-C or 1099-A forms.....	<input type="checkbox"/>	<input type="checkbox"/>
b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?		
17 Did you incur any casualty or theft losses during 2024?	<input type="checkbox"/>	<input type="checkbox"/>
18 Did you incur any non-business bad debts?	<input type="checkbox"/>	<input type="checkbox"/>
19 Did you pay any individual for domestic services in 2024?	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you take a retirement account distribution related to a natural disaster?	<input type="checkbox"/>	<input type="checkbox"/>
21 Did you buy or sell any stocks or bonds in 2024?	<input type="checkbox"/>	<input type="checkbox"/>
22 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? ..	<input type="checkbox"/>	<input type="checkbox"/>
23 Did you incur any moving expenses? If yes , attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
24 Did you receive any income not included in this Tax Organizer?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please attach information.		
25 Do you expect your income and deductions in 2025 to be the same as 2024?	<input type="checkbox"/>	<input type="checkbox"/>
If no , attach explanation of changes expected.		
26 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach	<input type="checkbox"/>	<input type="checkbox"/>
27 At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	<input type="checkbox"/>	<input type="checkbox"/>
28 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____		
29 Enter your state of residence.....	Taxpayer	Spouse
30 a Do you want to change the language with which the IRS communicates with you?	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, which language?		

Electronic Filing and Direct Deposit of Refund Yes No

If your tax return is eligible for Electronic Filing, would you like to file electronically?.....

The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.
If you receive a refund, would you like direct deposit?

If **yes**, please provide a voided check (not a deposit slip) if your bank account information has changed.
What type of account is this?..... Checking Savings

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)

Tax Data

Private & Confidential

Please complete, print, and then sign and date this Order Form.

I/we have enclosed the Tax Interview and our tax data.*

A down-payment of \$31 is enclosed. We will charge your credit card, if indicated below, plus any additional amount due for your tax return. This down-payment will reduce the final amount due.

I/we do not want electronic filing (there is a surcharge for paper returns).

Check here if Federal Only Return

Pre-payment is required.

Payment Method (Do not send cash)

Check Money Order Visa MasterCard

Credit Card Account Number _____

Name on Credit Card

First,MI _____

Last _____

Expiration Date ____ / ____

Billing Address for Credit Card

Number and street or P. O. Box, Apt No.

City, town or post office, County, State

Zipcode

My/our REFUND(s), if any, should be:

- Check: mailed to the address on the Tax Return.
- Direct Deposit: use the account number on the check used for payment.
- Direct Deposit: use the account number on the enclosed VOIDED check.

My/our BALANCE(s) DUE, if any, should be Direct Debit on Date: ____ / ____ / ____

- Direct Debit: use the account number on the check used for payment.
- Direct Debit: use the account number on the enclosed VOIDED check.

Mail all documents to: TFI, P O Box 6682, Albany, CA 94706

Voice: 408-625-7648 FAX: 408-638-0164

Taxpayer/Spouse Signature _____ Date: ____/____/____

We will mail you a review copy of your return shortly after we receive your tax data and payment.

Tax Services Agreement

The purpose of this agreement is: to confirm and specify the terms of our service and to clarify the nature and extent of those services. By signing this order form you confirm: your (and your spouse's) acceptance of this agreement.

We will prepare your Federal and State income tax returns from the information you send to us. We are not auditors for the IRS; we will not audit or verify the data you submit to us. We may need to ask you for clarification of some of the data. Before your return is filed, we will provide you a copy of your return for your review.

You are responsible for: providing to us all of the data required for us to prepare complete and accurate tax returns for you. You represent that the data you supply to us are accurate and complete to the best of your knowledge. You should keep all the documents, canceled checks, and other data that form the basis of your tax return. You are responsible for your income tax returns; you should carefully review them before they are filed.

We will use our judgment to resolve: (1) questions where the tax law is unclear, or (2) questions where there may be conflicts between the taxing authority's interpretation of the law and other supportable positions. We plan to do reasonable research to support the positions we take in your income tax returns. Unless you instruct us to do otherwise: whenever possible, we will resolve such tax questions in your favor.

Tax authorities may pick your tax return for review. If penalties, interest, or additional taxes are assessed: you agree you are responsible for their payment and will not look to us for reimbursement. If you receive a letter from a tax authority regarding a return we prepared for you: we can help you prepare a response. However, we cannot represent you in: (1) an audit of your return or (2) a formal appeal of the tax authorities proposed adjustments to your return.