

2025	1040	US	Tax Organizer
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 Flagstaff, AZ 86001
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 E-mail address:

Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2025 tax return. Please enter all pertinent 2025 information. If you have attached a government form for an item, check the box and do not enter a 2025 amount.

CLIENT INFORMATION

Taxpayer

Spouse

First name and initial.....		
Last name.....		
Title/suffix.....		
Social security number....		
Occupation.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
1=blind.....		
Home phone.....		
Work phone.....		
Work extension.....		
Cell phone.....		
E-mail address.....		
Drivers License #.....		
Drivers License State.....		
Issue Date.....		
Expiration Date.....		

Address

Street address.....
 Apartment number.....
 City.....
 State..... AZ
 ZIP code.....

DEPENDENTS

Dependent No.

Dependent No.

First name.....		
Last name.....		
Title/suffix.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
Date of adoption (m/d/y).....		
Social security number....		
Relationship.....		
Months lived at home.....		

WAGES, SALARIES AND TIPS

Employer Name:

<input type="checkbox"/>	
<input type="checkbox"/>	

2025 Amount

2024 Amount

Attach Forms W-2

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Please enter all pertinent 2025 information. If you have attached a government form for an item, check the box and do not enter a 2025 amount.

INTEREST INCOME

Payer Name:

Form with two input lines for Payer Name.

Table with columns for 2025 Amount and 2024 Amount, and a row for Attach Forms 1099-INT.

DIVIDEND INCOME

Payer Name:

Form with two input lines for Payer Name.

Table with columns for 2025 Amount and 2024 Amount, and a row for Attach Forms 1099-DIV.

PENSION AND IRA INCOME

Payer name:

Form with two input lines for Payer name.

Table with columns for 2025 Amount and 2024 Amount, and a row for Attach Forms 1099-R.

GAMBLING WINNINGS

Payer name:

Form with two input lines for Payer name.

Table with columns for 2025 Amount and 2024 Amount, and a row for Attach Forms W-2G.

Total gambling losses.....
Winnings not reported on Form W-2G.....

Table with columns for 2025 Amount and 2024 Amount for gambling losses.

OTHER GOVERNMENT FORMS - INCOME

- Form 1099-B - Sales of stock (also include transaction history).....
Form 1099-MISC - Miscellaneous income.....
Form 1099-K - Merchant card and third party network payments.....
Form 1099-S - Sales of real estate (also include closing statements).....
Form 1099-G - State tax refunds.....

Table with columns for 2025 Amount and 2024 Amount, and a row for Attach Forms 1099.

Taxpayer:

- Form SSA-1099 - Social security benefits.....
Form 1099-G - Unemployment compensation.....

Table with columns for 2025 Amount and 2024 Amount, and a row for Attach Forms 1099.

Spouse:

- Form SSA-1099 - Social security benefits.....
Form 1099-G - Unemployment compensation.....

Table with columns for 2025 Amount and 2024 Amount, and a row for Attach Forms 1099.

MISCELLANEOUS INCOME

Alimony received.....
Spouse: Alimony received.....

Table with columns for 2025 Amount and 2024 Amount for alimony received.

Other:

Form with two input lines for Other miscellaneous income.

Table with columns for 2025 Amount and 2024 Amount for other miscellaneous income.

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RETIREMENT PLAN CONTRIBUTIONS

Taxpayer:

- Traditional IRA contributions (1=maximum).....
- Roth IRA contributions (1=maximum).....
- Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

2025 Amount	2024 Amount

Spouse:

- Traditional IRA contributions (1=maximum).....
- Roth IRA contributions (1=maximum).....
- Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

OTHER GOVERNMENT FORMS - DEDUCTIONS

- Form 1098-E - Student loan interest.....
- Form 1098-T - Tuition and related expenses.....

Attach Forms 1098	

Affordable Care Act

- Form 1095-A - Health Insurance Marketplace Statement.....

Attach Forms 1095	
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ADJUSTMENTS TO INCOME

Taxpayer:

- Self-employed health insurance premiums.....
- Educator expenses.....
- Expenses from rental of personal property.....

Other adjustments to income:

Alimony Paid - Recipient name & SSN

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Spouse:

- Self-employed health insurance premiums.....
- Educator expenses.....
- Expenses from rental of personal property.....

Other adjustments to income:

Alimony Paid - Recipient name & SSN

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MEDICAL AND DENTAL EXPENSES

- Prescription medicines and drugs.....
- Doctors, dentists and nurses.....
- Hospitals and nursing homes.....
- Insurance premiums.....
- Taxpayer: Long-term care premiums.....
- Spouse: Long-term care premiums.....
- Insurance reimbursements.....
- Out-of-pocket lodging and transportation expenses.....
- Number of medical miles.....

Other:

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Please enter all pertinent 2025 information. If you have attached a government form for an item, check the box and do not enter a 2025 amount.

CASH CONTRIBUTIONS (Continued)

Volunteer Expenses (out-of-pocket).....
Number of charitable miles.....

2025 Amount

2024 Amount

Table with 2 columns: 2025 Amount, 2024 Amount. Rows for Volunteer Expenses and Number of charitable miles.

NONCASH CONTRIBUTIONS

Note: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

Blank lines for non-cash contributions.

Table with 2 columns: 2025 Amount, 2024 Amount. Rows for non-cash contributions.

MISCELLANEOUS DEDUCTIONS

Union and professional dues.....
Tax return preparation fee.....
Safe deposit box rental.....
Investment expenses.....
Estate tax, section 691(c).....

Unreimbursed employee expenses:

Blank line for unreimbursed employee expenses.

Table with 2 columns: 2025 Amount, 2024 Amount. Row for unreimbursed employee expenses.

Other:

Blank line for other miscellaneous deductions.

Table with 2 columns: 2025 Amount, 2024 Amount. Row for other miscellaneous deductions.

2025

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US/AZ

Direct Deposit & Estimates (Form 1040 ES)

3, 6

Please enter all pertinent 2025 information.

DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)

1=direct deposit of federal tax refund into bank account		
1=electronic payment of balance due		
1=electronic payment of estimated tax		
1=state direct deposit		
1=state electronic payment of balance due		

BANK INFORMATION

Name of Bank	Percent to Deposit (xx.xx)	Routing Number	Account Number	Type of Account (Table 1)	Type of Invest. (Table 2)

2025 ESTIMATED TAX / 1040-ES (6)

Federal

	Amount Paid	Date Paid	TS	2025 Voucher Amount
Overpayment applied from 2024				
1st quarter payment				
2nd quarter payment				
3rd quarter payment				
4th quarter payment				
Additional Estimated Tax Payments				
Paid with extension				
Former spouse SSN if joint estimates				

State

	Amount Paid	Date Paid	TS	2025 Voucher Amount
Overpayment applied from 2024				
1st quarter payment				
2nd quarter payment				
3rd quarter payment				
4th quarter payment				
Additional Estimated Tax Payments				
Paid with extension				

1 Type of Account

1 = Savings
2 = Checking

2 Type of Investment

1 = Checking or savings (default) 6 = Coverdell savings account (ESA)
 2 = Taxpayer's IRA (next year limits) 7 = Other
 3 = Spouse's IRA (next year limits) 8 = Taxpayer's IRA (current year limits)
 4 = Health savings account (HSA) 9 = Spouse's IRA (current year limits)
 5 = Archer MSA

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Please enter all pertinent 2025 information.

APPLICATION OF 2025 OVERPAYMENT (7.1)

If you have an overpayment of 2025 taxes, do you want the excess refunded? or applied to 2026 estimate?

Other (please explain): _____

2026 ESTIMATED TAX INFORMATION

Do you expect your 2026 taxable income to be different from 2025? Yes No

If "yes" explain any differences in income, deductions, dependents, etc.: _____

Do you expect your 2026 withholding to be different from 2025? Yes No

If "yes" explain any differences: _____

