



**2025
TAX ORGANIZER**

Taxpayer Information				Spouse Information	
Last Name:				Last Name:	
First Name:				First Name:	
Middle Initial:		Suffix		Middle Initial:	
Social Security #:				Social Security #:	
Occupation:				Occupation:	
Work Phone:		Ext		Work Phone:	
Cell Phone:				Cell Phone:	
E-mail address:				E-mail address:	
Date of birth				Date of birth	
Veteran?				Veteran?	
Driver's License #				Driver's License #	
D/L issue date				D/L issue date	
D/L expiration date				D/L expiration date	
State				State	
Address: _____ City: _____ State: _____ Home Phone: _____ Fax #: _____ Apartment #: _____ Zip Code: _____					
Dependent Information					
First Name	MI	Social Security #	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					
How much college and/or pre-K tuition was paid in 2025? \$ _____ \$ _____					
Attach all Form 1098-T's and a list of your qualified education expenses.					
For college age dependents: indicate year attended in 2025 (Spring - Sophomore, Fall- Junior, etc.)					
Student Loan Interest Paid					
Enter total 2025 qualified student loan interest \$ _____					

Attach Form(s) W-2 - Wages, Salaries, Tips and Other Compensation		
Employer Name		2025 Amount
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____
Attach Form(s) 1099-R - Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRA's, etc.		
1099-R Payer Name		2025 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 and 1099-NEC		
1099-MISC Payer Name and 1099-NEC Payer Name (under which business/occupation is this under?)		2025 Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
Attach Form(s) 1099-INT - Interest Income		
1099-INT Payer Name		2025 Amount
_____		_____
_____		_____
_____		_____
_____		_____
Attach Form(s) 1099-DIV - Dividend Income		
1099-DIV Payer Name		2025 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, Sched K-1's - Partnership, S-Corp, Trust or Estate Income,		
Form(s) W-2G - Gambling or Lottery Winnings, Form(s) 1099Q - Payments from Qual Education Programs		
Other Income:		
Alimony (divorce agreements prior to Jan 01, 2019), 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.		
	Taxpayer	Spouse
Retirement Plan Contributions		
Traditional IRA contributions made for 2025	_____	_____
Roth IRA contributions made for 2025	_____	_____
If any distributions/recharacterizations, what is the year-end fair market value?	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____

Medical and Dental Expenses (retain receipts for your records)	2025 Amount
Prescription medications	
Health Insurance Premiums	
Doctors, Dentists, etc.	
Hospitals, clinics, etc.	
Eyeglasses and contact lenses	
Parking and tolls for medical purposes	
Miles driven for medical purposes (\$0.21 per mile)	
Long-Term care premiums	
Other medical and dental expenses:	
Taxes	2025 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	2025 Amount
<i>Points paid on loan to buy, build or improve main house</i>	
Lender's Name	2025 Amount
Cash/Check/Credit Contributions (any additional, please attach)	2025 Amount
Noncash Charitable Contributions	
Attach all receipts with details listing the following information: Donee name, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.	
Rents Paid	2025 Amount
How much rent did you pay?	\$
In what state was the rent paid? _____	
Miscellaneous Deductions (since 2018, most individuals cannot claim)	
OTHER HELPFUL HINTS:	
- Your doctor and pharmacy can print you a convenient summary of the year's medical expenses paid (please request)	
- NJ Unemployment benefit tax information (Form 1099-G) MUST be downloaded from the NJ website	

		Yes	No
1 Did a lender cancel any of your debt in 2025 (Attach any Forms 1099-A or 1099-C)		☐	☐
2 Did you make qualified energy efficient improvements to your home or purchase an energy-saving property during 2025? If yes, please attach details.		☐	☐
3 Did you purchase a motor vehicle or boat during 2025? If yes, attach documentation showing sale tax paid.		☐	☐
4 Did you donate a vehicle in 2025? If yes, attach Form 1098C		☐	☐
5 Did your marital status change during 2025? If yes, please explain _____.		☐	☐
6 Were you or your spouse permanently and totally disabled in 2025?		☐	☐
7 Do you have dependents who must file?		☐	☐
8 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,600		☐	☐
9 Did you provide over half the support for any other person during 2025?		☐	☐
10 Did you incur adoption expenses during 2025?		☐	☐
11 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? If IRA recharacterized, what was the FMV at year-end? _____		☐	☐
12 Did you receive any disability payments in 2025?		☐	☐
13 Did you receive tip income not reported to your employer?		☐	☐
14 Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2025? a If yes , attach closing or escrow statements, 1099-C or 1099-A Forms. b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?		☐	☐
15 Did you incur any casualty or theft losses during 2025?		☐	☐
16 Did you incur any non-business bad debts?		☐	☐
17 Did you pay any individual for domestic services in 2025?		☐	☐
18 Did you take a retirement account distribution related to the corona virus or a natural disaster?		☐	☐
19 Did you buy or sell stock or bonds in 2025?		☐	☐
20 Did you use the proceeds from Series EE or I US savings bonds purchased after 1989 to pay for higher education expenses?		☐	☐
21 Did you incur any moving expenses? If yes , attach details.		☐	☐
22 Did you receive any income not included in any of the previous pages so far? If yes , please attach.		☐	☐
23 Do you expect your income and deductions in 2025 to be the same as 2025? If no , attach explanation of changes expected.		☐	☐
24 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach.		☐	☐
25 At any time during 2025, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?		☐	☐
26 (Prior Jan 1, 2019) If you paid any alimony, enter recipient's SSN: _____ Alimony paid: \$ _____ Date of divorce? _____ Name of ex-spouse _____			
27 Enter your state residence : Taxpayer _____ Spouse _____			
28 Did you apply for a Homestead Rebate from NJ in 2025?		☐	☐
29 Did you make untaxed internet purchases in 2025? (helpful tip: you can download your Amazon purchase history) If yes, please provide a total amount \$ _____ (For your records, retain a schedule of: the description, date of purchase, purchase price (incl shipping))		☐	☐
30 Do you have any Foreign Bank and/or Financial accounts directly in your name or you have control over?		☐	☐

Electronic Filing and Direct Deposit of Refund

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

If you receive a refund, would you like direct deposit (if available)?

If yes, please provide a voided check (not a deposit slip) if your bank account has changed.

Bank name and type of account? _____ Checking _____ Savings _____

Account Number _____ Routing Number _____

Estimated Tax Paid

Federal: Dates _____ Amounts _____

State: Dates _____ Amounts _____

Local: Dates _____ Amounts _____

Additional Information

Enter any additional information here and attach any documents.
