

**PERSONAL DATA ORGANIZER**

**EASTSIDE TAX & ACCOUNTING**

Name: \_\_\_\_\_

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Date: \_\_\_\_\_

This is your tax organizer for the 2025 Tax Year. Please complete the sections that pertain to you.

Time: \_\_\_\_\_

Any questions or comments can be written in spaces provided.

You may also choose to call the office and speak with a preparer.

With: \_\_\_\_\_

PERSONAL IDENTITY PROTECTION PIN: T \_\_\_\_\_  
S \_\_\_\_\_

**PLEASE BRING THE FOLLOWING TO YOUR TAX APPOINTMENT**

**ALL W2, 1099's, K-1's, ETC**

- ❖ CHILD CARE STATEMENT/PROOF OF DEPENDENT RESIDENCY
- ❖ MUTUAL FUND YEAR-END STATEMENT
- ❖ YEAR-END BANK STATEMENTS (BIZ CLIENTS)
- ❖ DRIVER LICENSE
- ❖ SOCIAL SECURITY STATEMENT -- FORM SSA-1099
- ❖ PROPERTY TAX STATEMENTS
- ❖ MORTGAGE INTEREST STATEMENTS
- ❖ MORTGAGE REFINANCE SETTLEMENT STATEMENTS
- ❖ EDUCATION FORMS 1098-E OR 1098-T
- ❖ PROPERTY SALES SETTLEMENT STATEMENTS
- ❖ OTHER EVIDENCE OF INCOME & DEDUCTIONS

- ❖ DATES OF BIRTH & SOCIAL SECURITY NUMBERS FOR ALL
- ❖ A CURRENT VOIDED CHECK -- FOR DIRECT DEPOSIT
- ❖ COST INFORMATION FOR STOCK & BONDS SOLD
- ❖ 1095-A ACA HEALTH COVERAGE FORMS
- ❖ 1099-C DEBT FORGIVENESS
- ❖ 1099-G UNEMPLOYMENT
- ❖ 1099-B BROKERAGE TAX REPORTING STATEMENT
- ❖ DOCUMENTATION OF ESTIMATED TAX PAYMENTS

*New clients please bring a copy of last year's return.*

**FOR OFFICE RECORDS THESE QUESTIONS NEED TO BE ANSWERED**

PLEASE ANSWER QUESTIONS FOR ACCURACY	YES	NO		YES	NO
Are you self-employed or receive hobby income? <small>Complete section on page 3</small>			Did you receive Marketplace health insurance? Bring Form 1095-A.		
Do you have farm income?			Does Employer provide health insurance?		
Do you own rental property? <small>Complete section on page 3</small>			Did you pay rent? How much? To whom?		
Have you purchased/sold BITCOIN/CYBER CURRENCY?			If renting, do you pay heat How much?		
Did you sell/take money from stocks or mutual funds? (If so, bring cost) Worthless securities? <small>Page 2</small>			Do you pay student loan interest & tuition for family members? (Bring Form 1098-T & 1098-E)		
Do you have a foreign bank account, trust or business?			Did your child under 24 yrs. old earn interest, dividends, gains, of \$1,350 or more?		
Did you receive OVERTIME/TIP INCOME?			Did your child receive W2 wages? How much?		
Did you refinance your home (bring statement)?			Did you make energy saving improvements?		
Did you contribute to or withdraw from an IRA/401(k)?			Did you convert an IRA to a ROTH IRA?		
Any births, deaths, marriages, adoptions or moves?			Did you give anyone more than \$19,000?		
Did you receive a letter from the IRS or State? <small>Bring Copy</small>			Did you file bankruptcy?		

- If your dependent has W2 wages, allow us to file their tax return at a reduced price to avoid a dependency claiming issue.
- If you receive an IRS or State letter, please bring immediately to the office and not pay any amount due until you speak with a preparer.

AS ALWAYS, WE STAND READY TO SERVE ALL YOUR TAX, ACCOUNTING, BOOKKEEPING, PAYROLL NEEDS.

IF YOU HAVE QUESTIONS ABOUT OUR SERVICES, CALL US AT (517) 336 - 0151



**SELF-EMPLOYMENT OR ADDITIONAL INCOME**

OTHER INCOME	AMOUNT	BRING DOCUMENTATION OF AMOUNTS	AMOUNT
Alimony Received		Child Support Received	
Scholarships & Grants		Unemployment Received – Form 1099G	
Prizes, Bonuses, Awards		Gambling & Lottery Wining – Form W2G	
Unreported Tips		If Gambling, Winnings? Losses?	
Director Or Executor Fees		Jury Duty	
Workers Compensation		Disability Income	
Veterans Pension		Payments from prior Installment Sales	
State Income Tax Refund		<b>OTHER:</b>	
City Income Refund			

**SELF EMPLOYED BUSINESS INCOME & EXPENSES (1099'S) – MUST HAVE DOCUMENTATION FOR THE FOLLOWING**

Gross Income	Gifts	Postage & Ship.	Wages
Refunds	Equipment	Seminars/ Conf.	Rent Paid
Bgn Inventory	Interest	Small Tools	Fees
Purchases	Legal & Acctg.	Supplies	Business Insurance
End Inventory	Labor	Taxes & License	Internet
Advertising	Office Expense	Telephone	Meals
Bank Charges	Maintenance	Travel	<b>Other/Misc</b>
Dues & Pubs	Repair	Utilities	

**RENTAL INCOME & EXPENSES**  
(IF NEW RENTAL PROPERTY, PROVIDE SETTLEMENT STATEMENT & TAX BILL)

Property	Address		
1			
2			
3			
Property # Above	1	2	3
Income			
Advertising			
Cleaning & Fees			
Commission & Fees			
Insurance			
Legal & Professional			
Mortgage Interest			
Other Interest			
Repairs			
Supplies			
Taxes			
Utilities			
Labor			
Telephone			
Other			

**OFFICE IN HOME – FOR SELF EMPLOYED BUSINESS OR RENTALS**  
(USE MUST BE EXCLUSIVE, REGULAR & THE PRINCIPLE PLACE OF BUSINESS.)

Purchase Date	Cost		
Total ft <sup>2</sup>	Business Ft <sup>2</sup>	Rent	Utilities
Insurance	Maintenance	Repair	other

**BUSINESS USE OF AUTO (YOU MUST KEEP CURRENT WRITTEN RECORDS, INCLUDING YEAR-END MILEAGES TO TAKE AUTO DEDUCTIONS. CALL IF YOU HAVE ANY QUESTIONS ABOUT AUTO USE.)**

	Vehicle 1	Vehicle 2
Year/Make		
Total Miles		
Purchase Date		
Business Miles		
Commute Miles		
Interest Paid		
Oper. & Maintn Cost		
Lease Cost		
Home to Work Miles		

**FOR THOSE WHO MAY STILL ITEMIZE**

MEDICAL/DENTAL EXPENSES PAID IN CURRENT YEAR		(THESE ARE ONLY DEDUCTIBLE WHEN THEY EXCEED 7.5% OF YOUR INCOME)	
Medical Insurance premium (paid by you)		Doctor, Dentist, Nursing Care, Etc.	
Long Term Care Insurance		Glasses, Contacts, Hearing Aids, Batteries, Etc.	
Prescription Drugs/ Medical Equip & Supplies		Hospital, Nursing Home, ETC.	
Auto Mileage (for medical reasons)		Other Medical/Dental	

TAXES PAID		(BRING ALL PROPERTY TAX STATEMENT PAID & ASSESSED IN 2025 , EVEN IF NOT PAID, INDICATE ONES NOT ACTUALLY PAID)	
Real Estate (property) taxes		Taxable Value from tax statement	
Auto Tags		Other _____	

INTEREST EXPENSES		(CREDIT CARD & CAR LOAN INTEREST IS NOT DEDUCTIBLE UNLESS IT IS USED FOR HOME MORTGAGE OR BUSINESS)	
Mortgage Interest Paid		Land Contract Paid: \$	
Investment Margin Interest		Name _____	
Other Investment Interest		Address _____	
Other Deductible Interest		Social Security # _____	

CHARITABLE CONTRIBUTIONS		(AMOUNTS \$250 AND ABOVE MUST BE DOCUMENTED BY RECEIPTS)	
Cash Donations- Charity Name	Amount & Date	Non-Cash Donations- Charity & items description	FMV & Date

ENERGY EFFICIENT IMPROVEMENTS - SELLERS REPORT		(MUST BE DOCUMENTED BY RECEIPTS, BRING THEM WITH YOU)	
Insulation		Solar/Wind/Geothermal	
Windows/Skylights		Furnace or Water Boiler, Central Air (nat. gas, propane, oil)	
Exterior Doors		Electric Vehicle & Charging Stations	

Comments or questions:

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**We're Accountants for Main Street....**

**... Not Wall Street.**

**\*\*\*\*\*READ THE CREDIT SECTION BELOW\*\*\*\*\***

Dear Client

Hope the holidays were happy for you and your family, and that 2025 was a great year! Now that the year is over, it is time to settle up with our favorite uncle: Sam.

**If we've prescheduled an appointment for you, it's shown at the top of the enclosed Organizer.** If you need a different time or date, or if you do not have an appointment listed and would like one, please call.

Enclosed is your **Personal Tax Data Organizer**. For returning Clients we have included a **checklist** of items that appeared on the 2024 tax return. Please review the checklist and use it, and the Organizer, to help gather and record your tax information. Reviewing the checklist and completing the Organizer prevents you from overlooking information, ensures an accurate return, and allows us to keep your tax prep fees low. It also helps keep the IRS away. Call us, if you have questions. If you prefer, you may **drop off** your tax information. Many of our clients like the convenience of dropping off, and it helps to smooth out our workload.

If you **moved** out of the area, we would still like to do your taxes. Just mail, email, fax or electronically upload the information to us. We have many out-of-state clients. Distance is no barrier. We can prepare every state return. Just be sure we have your current address, phone numbers and email address.

**\*\*\*\*\*CREDITS\*\*\*\*\***

If you claim **Earned Income Credit, Child Credit** or **Education Credit**, the IRS is requiring tax preparers to get documentation of your eligibility for these credits before we file your return. **You must** provide school, medical and/or other evidence of children and education expenses to us. In addition, the IRS will not give you a refund of these credits until late February 2026. Also, if you file as **Head of Household**, you need to provide documentation that your dependent lived with you, in your household for more than half of the year 2025.

**\*\*\*\*\***

**The Affordable Care Act (OBAMACARE) is still a thing for some people in 2025.** If you get health insurance through the **Marketplace**, they will issue you a Form **1095-A**. **A copy also goes to the IRS.** The information on this form needs to be reported on your tax return. **The IRS will reject your return, if it's not included.**

**If you have dependents who file their own tax return, tell them NOT to claim themselves on their return. If they do, and if they file their return before you file yours, the IRS will reject your return, and we will need to amended returns. Please tell your children not to claim themselves if they file their own return.**

As of today, 2025 tax legislation has been set in the **One Big Beautiful Bill**. We don't expect many changes at this late date, however, one can never be sure what Congress will do when they finally pass an actual budget.

The **One Big Beautiful Bill** contains several major tax changes for 2025. They include no taxes on tips or overtime pay, extra senior deductions, increases in state and local tax deductions, increased child tax credits, and increased standard deductions, to name a few. Most of these changes have provisions that limit or eliminate them, based on income.

Your return will be e-filed, unless you specifically ask us not to. If you have not already given us a voided check, or **your checking account has changed**, please include a voided check with your tax information, so we can direct deposit your refunds. Also, the IRS announced that they **will not be accepting or issuing paper checks as of January 1, 2026**. We believe this includes payment of any tax owed for 2025, and estimated tax payments for 2026. If you owe taxes, we anticipate the need to include a direct debit from your bank account.

The last day for drop-offs is April 1st. After this date, we can't promise your return will be completed. If you need an **extension**, call us by **April 13<sup>th</sup>**. We cannot file an extension for you without your stated permission. We look forward to working with you in 2026.

Steve, Andy, Tom, Joyce, Shelly, Robin & Jessica  
Eastside Tax & Accounting LLC - (517) 336-0151