

Stephanie M. Bauer

Certified Public Accountant

Off (812) 932-1399 or (812) 623-2283

Fax (812) 932-1499 or (812) 623-2304

13200 State Route 46, Sunman, IN 47041

stephanie@bauer-cpa.com

This organizer is designed to assist you in gathering the information required for preparation of your individual income tax returns.

Please complete pages 2-9 and all applicable sections. Also, please provide details and documentation as requested (documents may be faxed, scanned/mailed (please use the "To send me secure files, click here" link in my email), dropped off or mailed.

The Internal Revenue Service (IRS) matches information returns/forms with amounts reported on tax returns. A negligence penalty may be assessed when income is underreported or when deductions are overstated. Accordingly, all information returns reflecting amounts reported to the IRS are also mailed or delivered to taxpayers in an envelope clearly marked "IMPORTANT TAX DOCUMENTS ENCLOSED" and should be submitted with this organizer. Include the following, if applicable:

- W-2 (wages)
- 1099-R (retirement)
- 1099-INT (interest)
- 1099-DIV (dividends)
- 1099-B (brokerage sales)
- 1099-MISC (rents, etc.)
- 1099-NEC (non-employee compensation)
- 1095-A (marketplace health insurance)
- 1098-T (education)
- Schedules K-1 (Forms 1065, 1120S, 1041)
- Annual brokerage statements
- 1098 (mortgage interest)
- 8886 (reportable transactions)
- Closing Disclosure (real estate sales/purchases)
- Copies of any tax elections or revocations in effect
- Other information statements

Please provide a copy of your (and your spouse's, if applicable) driver's license (front and back) if it renewed this past year. This information may be needed to electronically file your tax return. I do not need driver's licenses for Indiana residents.

The filing deadline for your income tax return is April 15th. Your completed tax organizer needs to be received no later than April 1st. Any information received after that date may require an extension to be filed for this return.

If an extension of time is required, any tax due should be paid with that extension. Any taxes not paid by the filing deadline may be subject to late-payment penalties and interest. If you don't pay a reasonable estimate of your tax liability, your extension may be deemed invalid, subjecting you to late-filing penalties.

Your return will be electronically filed unless otherwise requested or ineligible for e-file. The request to opt out of e-filing may require you to sign a form that will be filed with the taxing authority(ies).

Certification:

The undersigned certifies, to the best of his or her knowledge, that the information documented in and provided with this organizer is complete and accurate.

Certified by (taxpayer) _____

Certified by (spouse) _____ (if applicable)

If we did not prepare your prior year returns, provide a copy of federal and state returns for the two previous years.

The below name/address does not need to be completed if I prepared your tax return last year AND there are no changes.

Taxpayer's name _____ SSN _____ Occupation _____

Spouse's name _____ SSN _____ Occupation _____

Home address _____

City, town, or post office County State ZIP code School district

Telephone number Telephone number (taxpayer) Telephone number (spouse)

Home _____ Office _____ Office _____

Email (T) _____ Fax _____ Fax _____

Email (S) _____ Mobile _____ Mobile _____

Taxpayer date of birth _____ Blind? Yes No

Spouse date of birth _____ Blind? Yes No

► Dependent children who lived with you:

| Full name | SSN | Relationship | Birth date |
|-----------|-----|--------------|------------|
| | | | |
| | | | |

▶ Other dependents:

| Full name | SSN | Relationship | Birth date | # months resided in your home | % support furnished by you |
|-----------|-----|--------------|------------|-------------------------------|----------------------------|
| | | | | | |
| | | | | | |
| | | | | | |

Please answer the following questions and submit details for any question answered "yes." Yes No

▶ 1) Will the address on your current returns be different from that shown on your prior year returns?
If yes, provide the new address and the date moved. _____

▶ 2) Did any births, adoptions, marriages, separations, divorces or deaths occur related to you, your spouse or any of your dependents for 2024?
If yes, provide details. _____

▶ 3) Were there any changes in dependents from the prior year? If yes, provide details.

▶ 4) Are you entitled to a dependency exemption due to a divorce decree?

▶ 5) Did any of your dependents have unearned income of \$2,200 or more (\$400 if self-employed)?
If yes, do you want us to prepare your child's tax return? Unearned income (interest/dividends/gains) can no longer be included on the parent's tax return.

▶ 6) Are any dependent children married and filing a joint return with their spouse?

▶ 7) Did any dependent child 19-23 years of age attend school full time for less than five months during the year?

▶ 8) Has the IRS, or any state or local taxing agency, notified you of changes to a prior year's tax return in which you have not already notified us (including a partnership or LLC in which you have an investment)?
If yes, provide copies of all notices or correspondence received.

▶ 9) Did you receive any income from any legal proceedings, cancellation of student loans or other indebtedness during the year? If yes, provide details.

▶ 10) Did you/spouse receive as payment, or sell/dispose of, a digital financial asset (cryptocurrencies, etc))?

▶ 11) Did you make any gifts during the year directly, indirectly or in trust, exceeding \$18,000 per person?

▶ 12) Did you make any discounted gifts or gifts of future interest to any person or trust?

Yes No

- ▶ 13) At any time during the year, did you have a financial interest in, or signature authority over a financial account such as a bank or a securities account located in a foreign country?

If the aggregate value of all of your accounts exceeded U.S. \$10,000 at any time during the year, complete the following:

| Name and address of financial institution | Account type (bank securities/ other)** | Account number | Maximum value during the year* | Currency | Held separately (S) or jointly (J) or signature authority (SA) | Joint owner's name(s), address, and U.S. taxpayer identification number (if any) |
|---|---|----------------|--------------------------------|----------|--|--|
| | | | | | | |
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| | | | | | | |

* Please provide the highest value at any time during the year in the foreign currency.

** Treasury guidance presently (Form 114, *Report of Foreign Bank and Financial Accounts*) defines a foreign financial account as any bank, securities, securities derivatives or other financial instruments account. These accounts generally encompass any accounts in which the assets are held in a commingled fund and the account owner holds an equity interest in the fund (mutual fund). The term also means any savings, demand, checking, deposit, time deposit, debit card or credit card maintained with a financial institution or other person engaged in the business of a financial institution. A financial account also includes a commodity futures or options account, an insurance policy with cash surrender value (whole life), and an annuity policy with cash surrender value. There are extremely large penalties for not complying with the filing requirements of Form 114.

- ▶ 14) Did you have an interest in specified foreign financial assets valued at more than \$50,000 on the last day of the tax year or more than \$75,000 at any time during the tax year? Please include assets not previously listed for FinCEN 114 reporting.

| Description of asset | Identifying number | Date asset acquired or disposed of during the year | Maximum value of asset during the tax year | Currency/ exchange rate | If asset is stock of a foreign entity, provide name, type and mailing address | If asset is not a stock of a foreign entity, provide name of issuer, type and mailing address |
|----------------------|--------------------|--|--|-------------------------|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |

| | Yes | No |
|---|--------------------------|--------------------------|
| <p>▶ 15) Did you have foreign income, pay any foreign taxes that are not reflected on an enclosed 1099, or file any foreign information reporting or tax forms? Provide details. _____</p> | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>▶ 16) Were you the grantor, transferor or beneficiary of a foreign trust?</p> | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>▶ 17) Were you a resident of, or did you have income from, more than one state during the year? If so, provide details. You may be required to file tax returns and may also owe taxes in those states. _____</p> | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>▶ 18) Do you file use tax returns in any states?</p> | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>▶ 19) Do you have any unpaid sales/use tax for tax year 2024 (such as from goods you purchased online or from a catalog)?</p> | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>▶ 20) Do you and/or your spouse want to designate \$3 to the Presidential Election Campaign Fund? Taxpayer <input type="checkbox"/> Yes <input type="checkbox"/> No Spouse <input type="checkbox"/> Yes <input type="checkbox"/> No</p> | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>▶ 21) Do you wish to contribute to any state fund(s)? If yes, indicate amount(s) and which fund(s): _____ _____</p> | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>▶ 22) Did you or your spouse, if applicable, at any time during 2024, receive, sell, exchange or otherwise acquire any financial interest in virtual currency and if yes, please provide details of sales or exchanges?</p> | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>▶ 23) If you or your household did not maintain minimum essential health coverage for the entire year:</p> <p style="margin-left: 20px;">a. Were you offered coverage (through your or your spouse's plan) that you declined? <input type="checkbox"/> <input type="checkbox"/></p> <p style="margin-left: 20px;">b. If yes, did the coverage offer minimum value and was it affordable? <input type="checkbox"/> <input type="checkbox"/></p> <p style="margin-left: 20px;">c. Were you or any member of your household eligible for Medicare or Medicaid, but did not enroll? <input type="checkbox"/> <input type="checkbox"/></p> | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>▶ 24) Did you or any member of your family enroll in health insurance coverage through the Health Insurance Marketplace at healthcare.gov under the Affordable Care Act? If yes, enclose Form 1095-A, <i>Health Insurance Marketplace Statement</i>.</p> | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
|---|--------------------------|--------------------------|
| ▶ 25) Is more than one tax household sharing the premium tax credit? Examples include adult nondependent children, situations of divorce or a new marriage. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 26) Were you or your spouse eligible to participate in an employer's health insurance or long-term care plan | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 27) Do you want any overpayment of taxes applied to next year's estimated taxes? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 28) Do you want any federal or state refund deposited directly into your bank account? If yes, enclose a voided check. | <input type="checkbox"/> | <input type="checkbox"/> |
| a. Do you want any balance due directly withdrawn from this same bank account on the due date? | <input type="checkbox"/> | <input type="checkbox"/> |
| b. Do you want next year's estimated taxes withdrawn from this same bank account on the due dates? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 29) If you owe federal or state tax upon completion of your return, are you able to pay the balance due? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 30) Do you expect a large fluctuation in your income, deductions or withholding next year? If yes, provide details. _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 31) Did you receive any 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 (Form 1099-R and proof of rollover)? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 32) If you received an IRA distribution, which you did not roll over, provide details (Form 1099-R). | | |
| a. Did you or your spouse withdraw amounts from your IRA to acquire a personal residence or pay for unreimbursed medical expenses or higher education expenses? If yes, provide details. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 33) Did you convert IRA funds or any other qualified retirement plan funds into a Roth IRA? If yes, provide details (Form 1099-R). | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 34) Did you receive any disability payments this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 35) Did you have any taxable distributions from an ABLE account? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 36) Did you receive tip income not reported to your employer? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 37) Did you sell or purchase a principal residence or other real estate? If yes, provide the settlement sheet (Closing Disclosure) and Form 1099-S. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 38) Did you refinance any existing loans on your home or other real estate you own? If yes, provide the settlement sheet (Closing Disclosure). | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 39) Did you collect on any installment contract during the year? Provide details. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 40) During this year, do you have any securities that became worthless or loans that became uncollectible? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 41) Did you receive unemployment compensation? If yes, provide Form 1099-G. | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
|---|--------------------------|--------------------------|
| ▶ 42) Did you receive or pay any alimony during the year? If yes, provide details, including the date of the divorce agreement and the Social Security number of the spouse paying the alimony or whom the alimony was paid. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 43) Did you have any business casualty or theft losses during the year? If yes, provide details. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 44) Did you receive any proceeds (including insurance) on property which was taken from you by destruction, theft, seizure or condemnation? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 45) Did you, or do you plan to, contribute money before April 15, 2025, to a traditional or Roth IRA for the last calendar year? If yes, provide details (note that some states may have earlier due dates). | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 46) If you or your spouse have self-employment income, do you want to make a retirement plan contribution? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 47) Did you, or do you plan to, contribute money before April 15, 2025 to a health savings account (HSA) for the last calendar year? If yes, provide details. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 48) Did you receive any distributions from an HSA? If so, provide detail, including Form 1099-SA and Form 5498-SA. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 49) Did you incur expenses as an elementary or secondary educator? If so, how much? The amount deductible is limited to \$300 per taxpayer. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 50) If paid, how much real estate tax did you pay on your principal residence or any other real property owned? If an Indiana resident, and you paid rent to live in your IN residence, please provide landlord's name, address and amount paid. | | |
| ▶ 51) Did you purchase gasoline, oil or special fuels for non-highway use vehicles? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 52) Did you purchase an energy-efficient or other new vehicle? If yes, provide the purchase invoice. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 53) Did you pay sales tax on any large purchases, including home improvements? If yes, provide details. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 54) Did you make any energy-efficient improvements (remodel or new construction) to your home? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 55) Did you purchase and place in service any solar water heating, solar electric, fuel cells, small wind energy or geothermal heat pump to any property you own (not just your home)? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 56) Did you incur adoption expenses or adopt a U.S. child that the state determined has special needs? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 57) Did you acquire or sell any "qualified small business stock?" | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 58) Were you granted, or did you exercise, any stock options? If yes, provide details. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 59) Indiana residents - did you pay \$1,000 or more for your dependent(s) to attend a private school (K-12) or to be homeschooled? If yes, how many dependents were in private school or homeschooled? | <input type="checkbox"/> | <input type="checkbox"/> |

| | Yes | No |
|---|--------------------------|--------------------------|
| ▶ 60) Did you pay any household employee over age 18 wages of \$2,000 or more? | <input type="checkbox"/> | <input type="checkbox"/> |
| a. If yes, provide a copy of form W-2 issued to each household employee. | <input type="checkbox"/> | <input type="checkbox"/> |
| b. If yes, did you pay total wages of \$1,000 or more in any calendar quarter to all household employees? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 61) Did you surrender or cash in any U.S. savings bonds? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 62) Did you install a new exterior door or window, AC unit, furnace, water heater or geothermal system (note: roofs no longer provide an energy credit)? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 63) Did you acquire an EIN from the IRS for a new business you started? If yes, provide details. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 64) Did you purchase or convert property you already owned to rental property? If yes, provide the settlement sheet (Closing Statement). | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 65) Did you acquire or dispose of any interests in partnerships, LLCs, S corporations, estates or trusts this year? If yes, provide the Schedule K-1 that the organization has issued to you. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 66) Do you have records to support travel, meals or gift expenses incurred in your business? The law requires that adequate records be maintained for travel, meals and gift expenses. The documentation should include the amount, time and place, date, business purpose, description of gift(s) (if any), and business relationship of recipient(s). Note that entertainment expenses are no longer deductible. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 67) Did you participate in any bartering transactions (including the use of virtual currency)? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 68) Do you have evidence to substantiate all your charitable contributions? | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>Note: Current tax law requires taxpayers to have the following for all tax deductions of a donation to a charitable contribution of cash, check or any other monetary gift: (1) a bank record (such as a canceled check) or (2) a written communication from the charity that adequately documents the donation. If the donation is \$250 or more, you must have the appropriate written communication from the charity. Written acknowledgment from a donee organization must include (1) the amount of any cash you paid and a description of any property given to the organization, (2) a statement of whether or not the donee organization provides any goods or services related to the contribution, (3) if the donee organization provides any goods or services other than intangible religious benefits, a description and good faith estimate of the value of the goods or services, and (4) if the donee organization provides intangible religious benefits, a statement to that effect. If you make charitable contributions by payroll deductions, you should have a pay stub, Form W-2 or other document furnished by your employer that shows the total amount withheld for payment to a charity and the pledge card that shows the name of the charity. In order to take a deduction for donations of used clothing and household goods, they must be in "good used" condition or better. An exception allows deductions for single items that are appraised at more than \$500, even if they are not in "good condition".</p> | | |
| ▶ 69) Has your will or trust been updated within the last three years? If not, consider a review this year. | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 70) Can the IRS and state tax authority discuss questions about this return with the preparer? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ 71) Did you or any of your dependents receive a Federal IP PIN from the IRS or have you been a victim of identity theft, either in 2024 or in prior years? If you received an IP PIN, provide a copy of the IRS notice. | <input type="checkbox"/> | <input type="checkbox"/> |

Estimated tax payments made

| Prior year overpayment applied | Federal | | State (name) | |
|--------------------------------|-----------|-------------|--------------|-------------|
| | Date paid | Amount paid | Date paid | Amount paid |
| 1st quarter | | | | |
| 2nd quarter | | | | |
| 3rd quarter | | | | |
| 4th quarter | | | | |

Wages, salaries and other employee compensation

▶ Enclose all Forms W-2. Done N/A

Pension, IRA, and annuity income

Yes No

▶ Enclose all Forms 1099-R. Done N/A

▶ 1) Did you receive a lump sum distribution from your employer? Yes No

▶ 2) Did you "convert" a lump sum distribution into another plan or IRA account? Yes No

▶ 3) Have you elected a lump sum treatment for any retirement distributions after 1986? Yes No

Taxpayer

Spouse

▶ 4) If over age 70 ½, did you or your spouse make a contribution from your IRA directly to a charitable organization? Yes No

Miscellaneous income – List and enclose related Forms 1099 or other forms.

▶ 1) Enclose all 1099 SSA forms. Done N/A

Interest income – Enclose all Forms 1099-INT and statements of tax-exempt interest earned.

If not available, complete the following (my preference is to have the source document and to leave the below blank):

| TSJ* | Name of payer | Banks, S&L, etc. | U.S. bonds, T-bills | Tax-exempt | |
|------|----------------------------|------------------|---------------------|------------|--------------|
| | | | | In-state | Out-of-state |
| | | | | | |
| | | | | | |
| | | | | | |
| | Early withdrawal penalties | | | | |
| | | | | | |

* T = Taxpayer S = Spouse J = Joint

Interest income (seller-financed mortgage)

| Name of payer | SSN | Address | Interest received |
|---------------|-----|---------|-------------------|
| | | | |
| | | | |

Dividend income – Enclose all Forms 1099-DIV and statements of tax-exempt dividends earned.

If not available, complete the following (my preference is to have the source documents and to leave the below blank):

| TSJ* | Name of payer | Ordinary dividends | Qualified dividends | Capital gain distributions | Non-taxable | Federal tax withheld | Foreign tax withheld |
|------|---------------|--------------------|---------------------|----------------------------|-------------|----------------------|----------------------|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

*T = Taxpayer S = Spouse J = Joint

| Description | Amount |
|--------------------------------------|--------|
| State and local income tax refund(s) | |
| Alimony received | |
| Jury fees | |
| Finder's fees | |
| Director's fees | |
| Prizes | |
| Gambling winnings (W2-G) | |
| Trustee fees | |
| Executor fees | |
| Other miscellaneous income | |

Income from business or profession – Schedule C

▶ Who owns this business? Taxpayer Spouse Joint

Principal business or profession _____

Business name _____

Business taxpayer identification number _____

Business address _____

Yes/
Done No

▶ Method(s) used to value closing inventory:

Cost Lower of cost or market Other (describe) N/A

Accounting method:

Cash Accrual Other (describe) _____

▶ 1) Was there any change in determining quantities, costs or valuations between the opening and closing inventory? If yes, attach an explanation. Yes/ Done No

▶ 2) Did you deduct expenses for the business use of your home?
If yes, complete the office-in-home schedule provided in this organizer. Yes/ Done No

▶ 3) Did you materially participate in the operation of the business during the year? Yes/ Done No

▶ 4) Did you pay any health insurance premiums or long-term care premiums? Yes/ Done No

▶ 5) Was all of your investment in this activity at risk? Yes/ Done No

▶ 6) Were any assets sold, retired or converted to personal use during the year?
If yes, list assets sold including date acquired, date sold, sales price and original cost. Yes/ Done No

▶ 7) Were any assets purchased during the year? If yes, list assets acquired, including date placed in service and purchase price, including trade-in. Attach copies of purchase invoices. Yes/ Done No

▶ 8) Was this business still in operation at the end of the year? Yes/ Done No

▶ 9) List the states in which the business was conducted and provide income and expense by state. Yes/ Done No

▶ 10) Provide copies of certification for employees of target groups and associated wages qualifying for the work opportunity tax credit. Yes/ Done No

▶ 11) Did you make any payments during the year that would require you to file Form(s) 1099?
If yes, did you file Form(s) 1099? Yes/ Done No

▶ 12) If your Schedule C business has employees, can you provide copies of federal payroll forms
W-2/W-3, the annual 940 and 4th qtr 941? Yes/ Done No

Income and expenses (Schedule C) – Attach a schedule of income and expenses of the business or complete the following worksheet. Complete a separate schedule for each business.

| Description | Amount |
|---|--------|
| Part I – Income | |
| Gross receipts or sales | |
| Returns and allowances | |
| Other income (list type and amount) | |
| Part II – Cost of goods sold | |
| Inventory at beginning of year | |
| Purchases less cost of items withdrawn for personal use | |
| Cost of labor (do not include salary paid to yourself) | |
| Materials and supplies | |
| Other costs (list type and amount) | |
| Inventory at end of year | |
| Part III – Expenses | |
| Advertising | |
| Bad debts from sales or services | |
| Car and truck expenses (complete the auto expense schedule, pg 15) | |
| Commissions and fees | |
| Licensing | |
| Internet Access/Web Hosting | |
| Employee health insurance and other benefit programs (excluding retirement plans) | |
| Employee retirement contribution (other than for owner) | |
| Self-employed owner: | |
| a. Health insurance premiums | |
| b. Retirement contribution amount | |
| c. Type of retirement plan (Roth IRA, Traditional IRA, SEP, etc.) | |

| Description | Amount |
|---|--------|
| Insurance (other than health) | |
| Interest: | |
| a. Mortgage (paid to banks, etc.) | |
| b. Other | |
| Legal and professional services | |
| Office expense | |
| Rent or lease: | |
| a. Vehicles, machinery and equipment | |
| b. Real estate or other business property | |
| Repairs and maintenance | |
| Supplies | |
| Taxes and licenses (enclose copies of payroll tax returns; do not include state income tax) | |
| Travel, meals and entertainment: | |
| a. Travel | |
| b. Meals – 50% deductible | |
| c. Entertainment – social clubs are not deductible | |
| Utilities | |
| Wages (enclose copies of Forms W-3/W-2) | |
| Lobbying expenses | |
| Telephone/Mobile | |
| Computer Supplies, Software or Hardware | |
| Marketing | |
| Other expenses (list type and amount) | |
| | |
| | |

▶ Automobile expenses — Complete a separate schedule for each vehicle.

| | | | |
|---------------------------|-------|---|-------|
| Vehicle description | _____ | Total business miles | _____ |
| Date placed in service | _____ | Total commuting miles | _____ |
| Cost/fair market value | _____ | Total other personal miles | _____ |
| Lease term, if applicable | _____ | Total miles this year | _____ |
| | | Average daily round trip commuting distance | _____ |

▶ Actual expenses (omit if using mileage method)

| | | | |
|-----------------|-------|----------------|-------|
| Gas, oil | _____ | Taxes and tags | _____ |
| Repairs | _____ | Interest | _____ |
| Tires, supplies | _____ | Parking | _____ |
| Insurance | _____ | Tolls | _____ |
| Lease payments | _____ | Other | _____ |

Yes No

▶ Did you acquire, lease or dispose of a vehicle used for business during this year? If yes, enclose the purchase and sales contract or lease agreement. Yes No

▶ Did you use the above vehicle in this business less than 12 months? Yes No
If yes, enter the number of months. _____

▶ Do you have another vehicle available for personal purposes? Yes No

▶ Do you have evidence to support your deduction? Yes No

▶ Is the evidence written? Yes No

Office in home

► To qualify for an office-in-home deduction, the area must be used exclusively for business purposes on a regular basis in connection with your employer’s business and for your employer’s convenience. If you are self-employed, it must be your principal place of business or you must be able to show that income is actually produced there. If business use of home relates to daycare, provide total hours of business operation for the year.

| Business or activity for which you have an office | Total area of the house (square feet) | Area of business portion (square feet) | Business percentage |
|---|---------------------------------------|--|---------------------|
| | | | |

► I. Depreciation

| | Date placed in service | Cost/basis | Method | Life | Prior depreciation |
|--------------------------------|------------------------|------------|--------|------|--------------------|
| House | | | | | |
| Land | | | | | |
| Total purchase price | | | | | |
| Improvements (provide details) | | | | | |

II. Mortgage interest

Real estate taxes

Utilities

Property insurance

Other expenses – itemize _____

► III. Expenses that apply directly to home office:

Telephone

Maintenance

Other expenses – itemize _____

Did you make an election to apply a simplified method with respect to your home office expenses?

Yes

No

Capital gains and losses – Enclose all Forms 1099-B (with supplemental year-end brokerage statements) and 1099-S (with Closing Disclosure statements). Complete the following schedule if no statements are available and provide all transaction slips for sales and purchases.

| Description | Date acquired | Date sold | Sales proceeds | Cost or basis | Gain (loss)* |
|-------------|---------------|-----------|----------------|---------------|--------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

▶ Enter any sales NOT reported on Forms 1099-B and 1099-S:

| Description | Date acquired | Date sold | Sales proceeds | Cost or basis | Gain (loss)* |
|-------------|---------------|-----------|----------------|---------------|--------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

* If you have questions regarding the taxable status of any gain or loss, please contact our office.

Sale/purchase of personal residence

▶ Provide closing statements (Closing Disclosure) on purchase and sale of old residence and purchase of new residence.

| Description | Amount |
|-------------|--------|
| | |
| | |

| | | |
|---|--------------------------|--------------------------|
| | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ For sale of personal residence, did you own and live in it for two of the five years prior to the sale? | Yes | No |
| Was there any rental or business use during the period of ownership? | <input type="checkbox"/> | <input type="checkbox"/> |

Residence change

▶ If you changed residences during the year, provide the period of residence in each location.

Residence #1 _____ From ____/____/____ To ____/____/____

Own Rent

Residence #2 _____ From ____/____/____ To ____/____/____

Own Rent

Rental and royalty income – Complete a separate schedule for each property.

▶ 1) Description and location of property: _____

Yes No

▶ 2) Type of property:

Personal use

Residential rental

Commercial rental

Royalty

Self-rental

Other – describe _____

If personal-use property, provide the following:

1. Number of days the property was occupied by you, a member of your family or any individual not paying rent at the fair market value. _____

2. Number of days the property was not occupied. _____
If not occupied, was it available for rent during this time?

3. How many days was the property rented during the year? _____

▶ 3) Did you actively participate in the operation of the rental property during the year? Note that both requirements must be met by you (and not combined with your spouse's activity) to qualify as a real estate professional.

1. Were more than half of the personal services that you performed during the year performed in a real property trade or business?

2. Did you perform more than 750 hours of services during the year in a real property trade or business?

Yes No

- ▶ 4) Did you make any payments during the year that would require you to file Form(s) 1099 (Misc, NEC, etc.)? Yes No
- If yes, did you file Form(s) 1099? Yes No

| Income: | Amount | | Amount |
|-------------------|--------|-----------------------------------|--------|
| Rents received | | Royalties received | |
| Expenses: | | | |
| Mortgage interest | | Legal and other professional fees | |
| Other interest | | Cleaning and maintenance | |
| Insurance | | Commissions | |
| Repairs | | Utilities | |
| Auto and travel | | Management fees | |
| Advertising | | Supplies | |
| Taxes | | Other (itemize) | |

Yes No

- ▶ If this is the first year we are preparing your return, provide depreciation records. Yes No
- ▶ If this is a new property, provide the closing statement (Closing Disclosure). Yes No
- ▶ If the property was sold during the year, provide the closing statement (Closing Disclosure). Yes No
- ▶ List below any improvements or assets purchased during the year.

| Description | Date placed in service | Cost |
|-------------|------------------------|------|
| | | |
| | | |

Income from partnerships, estates, LLCs, trusts and S corporations

- ▶ Enclose all Schedules K-1 received to date. Also list below all Schedules K-1 not yet received:

| Name | Source code* | Federal ID number |
|------|--------------|-------------------|
| | | |
| | | |
| | | |

* Source code: P = Partnership/LLC E = Estate/trust S = S corporation

Contributions to retirement plans

| | Taxpayer | Spouse |
|--|---|---|
| Are you covered by a qualified retirement plan? (Y/N) | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Do you want to make the maximum deductible IRA contribution? (Y/N) | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| IRA contributions made for this return | | |
| IRA contributions made for this return for nonworking spouse | | |
| Do you want to make an IRA contribution even if part or all of it may not be deducted? (Y/N) If yes, provide a copy of the latest Form 8606 filed. | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Have you made, or do you want to make a Roth IRA contribution? (Y/N). If yes, provide Roth IRA contributions made for this return. | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Do you want to make the maximum allowable Keogh/SEP/SIMPLE IRA contribution? (Y/N) | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Keogh SEP/SIMPLE IRA contributions made for this return | | |
| Date Keogh/SIMPLE IRA plan established | | |

Medical and dental expense (Please note that medical expenses must exceed 7.5% of adjusted gross income to be deductible as an itemized deduction. Itemized deductions are generally only beneficial if they exceed your standard deduction. Health insurance premiums and medical expenses paid with pre-tax dollars (cafeteria plans, health savings accounts, etc.) are not deductible.)

| Description | Amount |
|---|--------|
| Premiums for health and accident insurance including Medicare | |
| Long-term care premiums: Taxpayer \$ _____ Spouse \$ _____ | |
| Medicine and drugs (prescription only) | |
| Doctors, dentists, nurses | |
| Hospitals, clinics, laboratories | |
| Eyeglasses/corrective surgery | |
| Ambulance | |
| Medical supplies/equipment | |
| Hearing aids | |
| Lodging and meals | |

Interest expense

▶ Mortgage interest (enclose Forms 1098)

| Payee* | Property** | Amount |
|--------|------------|--------|
| | | |
| | | |
| | | |

* Include address and Social Security number if payee is an individual.

** Describe the property securing the related obligation, i.e., principal residence, motor home, boat, etc. If any mortgage or equity loan was not used to buy, build or improve your principal or second residence, describe the amount of proceeds and how the proceeds were used.

▶ Unamortized points on residence refinancing

| Date of refinance | Loan terms | Total points |
|-------------------|------------|--------------|
| | | |
| | | |

▶ Student loan interest

| Payee | Amount |
|-------|--------|
| | |
| | |

▶ Investment interest expense not reported on Schedules A, C or E

| Payee | Investment purpose (stocks, land, etc.) | Amount |
|-------|---|--------|
| | | |
| | | |
| | | |

Contributions

- ▶ Cash contributions for which you have receipts, canceled checks, etc. Note: You need to have written acknowledgment from any charity to which you made individual donations of \$250 or more during the year.

| Donee | Amount | Donee | Amount |
|-------|--------|-------|--------|
| | | | |
| | | | |
| | | | |
| | | | |

- ▶ Expenses incurred in performing volunteer work for charitable organizations:

Parking fees and tolls \$ _____

Supplies \$ _____

Meals and entertainment \$ _____

Other (itemize) \$ _____

Automobile mileage _____

- ▶ Other than cash contributions (enclose receipts):

| | | |
|-------------------------------|--|--|
| Organization name and address | | |
| Description of property | | |
| Date acquired | | |
| How acquired | | |
| Cost or basis | | |
| Date contributed | | |
| Fair market value (FMV) | | |
| How FMV determined | | |

- ▶ Include Form 1098-C for donations of motor vehicles, boats or airplanes.

- ▶ Include a signed and dated Form 8283 by the donee organization and/or qualified appraiser, if applicable.

- ▶ For contributions over \$5,000, include a copy of the qualified appraisal and confirmation from the charity.

Casualty or theft losses

► Loss/damage of property. Note that personal casualty losses are only allowed if incurred in a federally declared disaster area.

| | Property | Property | Property |
|---------------------------------|--|--|--|
| Indicate type of property | <input type="checkbox"/> Business <input type="checkbox"/> Personal | <input type="checkbox"/> Business <input type="checkbox"/> Personal | <input type="checkbox"/> Business <input type="checkbox"/> Personal |
| Description of property | | | |
| Date acquired | | | |
| Cost | | | |
| Date of loss | | | |
| Description of loss | | | |
| Was insurance claim made? (Y/N) | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Fair market value before loss | | | |
| Fair market value after loss | | | |

Miscellaneous deductions

| Description | Amount |
|---|--------|
| Income tax preparation fees | |
| Documented gambling losses and expenses | |

Child care expenses/home care expenses

Yes No

► Did you pay an individual or an organization to perform services for the care of a dependent under 13 years old or your spouse or dependent age 13 or over, if physically or mentally incapable of caring for themselves in order to enable you to work or attend school on a full-time basis? Yes No

► Did you use funds from a cafeteria plan at work to pay for any daycare expenses? Yes No

► Did you pay an individual to perform in-home health care services for yourself, your spouse or dependents? Yes No

► If the response to either of the questions above is yes, complete the following:
Names(s) of dependent(s) for whom services were rendered.

- ▶ List individuals or organizations to whom expenses were paid during the year (services of a relative may be deductible only if that relative is not a dependent and if the relative's services are considered employment for Social Security purposes).

| Name and address | IDnumber | Amount | If under 18 |
|------------------|----------|--------|---|
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | | | <input type="checkbox"/> Yes <input type="checkbox"/> No |

- ▶ If payments of \$2,000 or more during the tax year were made to an individual, were the services performed in your home? Yes No

Educational expenses Yes No

- ▶ Did you or any other member of your family pay any post-secondary educational expenses this year? Yes No

▶ If yes, complete the following and provide Form 1098-T from the school:

| Student name | Institution | Grade/level | Amount paid | Date paid |
|--------------|-------------|-------------|-------------|-----------|
| | | | | |
| | | | | |
| | | | | |

- ▶ Was any of the preceding tuition paid with funds withdrawn from an educational IRA or 529 plan? Yes No

If yes, how much? \$ _____. Submit Form 1099-Q.

If you funded a college 529 plan, please provide the account number, the amount invested and the 529 plan name. Note for Indiana residents, you can fund an Indiana college choice 529 plan thru April 15, 2025 and have the credit assigned to year 2024.

New for 2024: Indiana residents – provide amounts paid to InvestABLE accounts (accts for disabled persons)

New for 2024: Indiana residents – provide total paid to health care sharing ministries, if applicable

