



CLIENT TAX ORGANIZER – TAX YEAR 2025

Date of 1st interview _____ PHONE _____

Name _____ Spouse _____

Address _____ County of residence _____

_____ School district number _____

E-mail address _____

Occupation _____ Occupation _____

Soc Security # _____ DOB _____ Soc Security # _____ DOB _____

_____ Have you had a change in your household (i.e., birth of a child, dependent no longer living with you)?

Dependents :

Dep #1 _____ Dep #2 _____

Soc Security # _____ DOB _____ Soc Security # _____ DOB _____

Dep #3 _____ Dep #4 _____

Soc Security # _____ DOB _____ Soc Security # _____ DOB _____

Any special dependent relationships _____

Please provide the following information :

_____ A copy of your 2024 tax return (if not in our possession).

_____ Original Form(s) W-2.

_____ Did you have any paid overtime? If so, how much and can you provide a copy of your last paystub?

_____ Did you receive any tips? If so, how much and can you provide a copy of your last paystub?

_____ Any K-1, Partnership, S Corp, estate or trust activity. Did you actively participate?

_____ If you have any self-employment, rental or farm income, request self-employment organizer.

_____ Copies of other compensation or pension documentation (1099-MISC or 1099-R).

_____ Form(s) 1099 or statements reporting dividend and interest income.

_____ Form(s) 1099-C or statements reporting forgiveness of debt.

_____ Form(s) 1098 reporting interest paid, copies of real estate tax bills.

_____ If more than one interest statement – what is the address for each.



_____ Do you have any interest for a 2025 purchase of a new US final assembled vehicle?

_____ Copies of closing statements regarding the sale or purchase of real property.

_____ If you paid rent, how much and who was the landlord & address.

_____ Copies of tax refunds.

_____ Copies of Provider of Dependent Care statements.

_____ Copies or summary of taxes paid (Vehicle, State Income, etc.)

_____ Copies or summary of IRA, pension or profit sharing contributions and/or receipts.

_____ Did you contribute into an Indiana 529 plan? Provide the beneficiaries name(s) and account number(s).

_____ Charitable contribution statements. Mileage _____

_____ Any large medical and dental expenses? Mileage _____

_____ Did you receive a 1095-A (Marketplace Insurance)? Please provide.

_____ Did you or your spouse have a health savings account (HS A) or participate in a family savings account (FSA)?

_____ Were you, your spouse or your child enrolled in college or a vocational school?

_____ Are your children home schooled or enrolled in a private primary school? If yes, number of children enrolled _____?

_____ Did you buy or sell any stocks or bonds in 2025?
If yes, attach broker's information (such as Form 1099-Bs and broker annual Statements) related to the transactions.

_____ At anytime in 2025 did you hold, acquire or sell any Virtual Currency (Bitcoin)? If yes, enclose detail.

_____ Did you make any federal or state estimated tax payments?

<u>Federal/State</u>	<u>Date</u>	<u>Check#</u>	<u>Amount</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

_____ Do you make any energy efficient improvements to your home?

_____ Do you have any personal vehicles used for business purposes?

	Vehicle #1	Vehicle #2
Make/Model	_____	_____
Beg Odometer	_____	_____
End Odometer	_____	_____
Business Miles	_____	_____
<i>Daily Commute</i>	_____	_____
Written Log?	_____	_____

_____ Did you receive any unemployment benefits?

_____ Do you have records, as described below, to support your deductions?
Tax law and IRS regulations allow deductions but require adequate records to be available if requested.

_____ Did you have any purchases in which required to pay use (sales) tax?

_____ Do you or anyone on your return have a personal pen issued by the IRS? If yes, please provide.

_____ Do you want to allow UAG to discuss this year's return with the IRS?
If no, enter another person to be allowed to discuss this return with the IRS

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

_____ Do we have a current driver's license for each tax payer on file?

_____ Have you had a banking relationship change in the past year?

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

If yes, please provide the following information:

Name of your financial institution: _____

Routing Transit Number: _____

Account Number: _____

What type of account is this? _____

Name on the account: _____



_____ Would you prefer an electronic version of the final tax return or a paper copy?

** Remember – the Internal Revenue Service is being aggressive in pursuing the requirement for substantiation of business mileage and meals.