



Tax Services  
TY 2025 Personal Tax Organizer

### Taxpayer & Spouse Information

Name	Date of Birth	Social Security #	Occupation

**Refund Delivery**  On file, last 4 digits of acct # \_\_\_\_\_  New bank acct (voided check required)

**\*Refunds issued by mail may take six weeks or longer and may require additional correspondence\***

### Filing Status

- Single  Married Filing Joint  Married Filing Separate  Qualifying Surviving Spouse  
 Head of Household (utility bill and rental or mortgage agreement required by law)  Dependent

### Life Change

- New address  Change in filing status  Change in dependents  No longer claimed as a dependent  
 Became self-employed  Retired in 2025  Purchased or sold a home  Purchased a vehicle  
 Renewed driver's license: Issued \_\_\_/\_\_\_/2025 Expiration \_\_\_/\_\_\_/20\_\_\_

### Contact Information

Home Address			
Communication	Phone:	Phone #2:	Email:

### Qualified Dependents for the Purpose of Tax Credits

Name	Date of Birth	Social Security #	Relationship	Months lived at home in 2025

### Income (Documentation Required)

- Wages & Salaries (W-2)  Self-Employment / 1099-NEC (Schedule C organizer required)  
 Rental Income (Schedule E organizer required)  Interest (1099-INT)  Dividends (1099-DIV)  
 Retirement distributions (1099-R)  Social Security benefits  Unemployment compensation  
 State Paid Family & Medical Leave (PFML)  Trust / Estate / Partnership (K-1)  
 Foreign assets over \$10,000  Lottery or gambling winnings  Cryptocurrency transactions (1099-DA)  
 Merchant card / third-party payments (1099-K) Type of income:  Personal  Business

### Other Income

(Please provide documentation for the following forms of income that apply to you.)

- State tax refund  Cancellation of debt (1099-C / 1099-A)  Alimony (pre-2019)  Tips not on W-2  
 Investment or property sale (1099-B / 1099-S)  Education account (1099-Q)  Hobby or misc. income

### Adjustments (Schedule 1-A New for 2025)

- Qualified Tip Income Deduction: W-2 / Sch. C reported tips \$ \_\_\_\_\_  
 Qualified Overtime Pay Deduction: Overtime premium only \$ \_\_\_\_\_  
  Senior Deduction (age 65+)  Student loan interest  Legally blind  
 **New** Vehicle Loan Interest: Interest paid in 2025: \$ \_\_\_\_\_ make / model / year / VIN document req.  
 Trad.  Roth IRA contributions \$ \_\_\_\_\_  Full-time teacher supplies \$ \_\_\_\_\_

### Credits (Documentation Required)

- Child Tax Credit / Dependent Credits  
 Education credits (1098-T & receipts)  Full-Time Student  First 4 years  Post-Grad Degree  
 Residential Energy Credit (item / date replaced / purchase price)  
 Clean Vehicle Credit (new or previously owned- make / model / year / date purchased)  
 MA Circuit Breaker Credit (not eligible if home in trust / age 65+ only)  MA Septic System Credit



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### Estimated Tax Payments Made

	1st (4/15/25)	2nd (6/16/25)	3rd (9/15/25)	4th (1/15/26)
Federal	\$	\$	\$	\$
State	\$	\$	\$	\$

### Itemized Deductions

Medical Expenses (must exceed 7.5% of AGI)		
Post-tax insurance \$	Prescriptions \$	Dr / Dental / Hospital \$
Miles driven	Other medical \$ (Please retain receipts for all medical claimed)	

Taxes Paid (SALT limit applies) & Circuit Breaker Credit		
Real estate tax \$	Excise tax \$	Water & sewer (65+) \$

Charitable Contributions		
Cash or check \$	Non-cash donations \$	Miles driven for charity

Interest Paid	
Home mortgage interest \$	Home equity loan (qualified use only) \$

### Childcare Expenses (All Information Required)

Dependent Name	Provider Name	Provider Address	Provider ID # / SSN	Amount Paid
				\$
				\$

### Cryptocurrency

At any time during 2025, did you receive (as a reward, award, or payment for property or services); or sell, exchange, gift, or otherwise dispose of a digital asset (or financial interest in a digital asset)?  Yes  No

### MA Deductions

- Rent paid \$ \_\_\_\_\_  Fast Lane & Public Transportation \$ \_\_\_\_\_  
 529 Plan Contributions: \$ \_\_\_\_\_ Quantity of Accts \_\_\_\_\_

### Health Insurance

- 1099-HC (MA)  Medicare  Marketplace insurance (1095-A required)  
 Partial-year coverage (list months)  No coverage for one or more months in 2025

### Additional Information or Questions

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