Keystone Tax Preparation, LLC

Individual Form 1040 Income Tax Organizer

Use the Organizer on the next page to provide the information required to complete and file the 2024 Federal & State Individual Income Tax Return.

This organizer is for both Returning and New income tax return preparation clients.

Returning Clients should ONLY complete the information on Page 1 that is new or changed. There is no need to re-enter contact and identifying information that has not changed. BUT, all clients need to complete pages 2 and 3 concerning income and adjustments to income. Please provide you Drivers license information for e-filing returns on page 1.

New Clients should complete ALL of Page 1, even if attaching the prior year return. It is possible the prior preparer made a mistake. Also, much of the information required to E-file an income tax return is not visible on your prior year tax return, including: dates of birth, drivers' license, and other information.

All Clients: Do not be overwhelmed at first glance. If a section, line or box does not apply to you, move on to the next section, line or box. This exercise should only take a few minutes for those with a simple return. Every minute spent providing us the information requested on this organizer in advance will save multiples of that time in phone calls or emails asking or supplying the same information. Therefore, please make you best effort to complete this organizer and attach to your other tax information.

Itemized Deductions: Many taxpayers do no benefit by providing the traditional Itemized Deductions (mortgage interest, real estate taxes, medical, charity or tithing) due to changes in tax law and increases the "Standard Deduction." The Standard Deduction is the amount every taxpayer can deduct to limit the number of people who need to gather and report Itemized Deductions.

Please gather the following documents:

- Form(s) W-2 (wages, etc)
- 1099-R, 1099-B (accounts not managed by Keystone)
- Form(s) 1099-INT or DIV (all pages)
- 1099-G, 1099-SA and 1099-RRB forms
- Closing statements pertaining to real estate transactions
- Any tax notices recieved from the IRS or other taxing authority
- New clients supply a copy of 2023 returns
- All other supporting documents

All information can be sent to us electronically via our secure client portal Right Capital. Please call our office if you have not yet recieved the Right capital invitation email.

If hard copies of these supporting documents are provided to us, we will return them to you with your completed tax forms.

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Individual Form 1040 Income Tax Organizer

2024

New Client: ____ Keystone Prepared 2023 Return: ______

Office or Preparer Location: Martinez ____ Birmingham: ____

Delivery Method: Email: ______ Portal: ____ Drop Off: ____ In Person: ______

New Client: Complete Page 1 in-full. Attach 2023 tax return if possible.

Returning Client: Write Name(s) and ONLY complete New or Changed information on Page 1.

All Clients: Have any of the following circumstances changed since your 2023 Income Tax Return? Married, Divorced or Widowed: __________ Removed a Dependent (if so, Name): __________

Bring Or Send This Form With Below Requested Attachments All At One Time When Complete

SECTION 1 - IDENTIFICATION INFORMATION

Primary Taxpayer		**Spouse** (Include Name, SSN & DOB even if filing separately)	
Social Security #:		**Social Security #:**	
First Name:		**First Name:**	
Middle Name:		**Middle Name:**	
Last Name:		**Last Name:**	
Date of Birth:		**Date of Birth:**	
Cell Phone #:		**Cell Phone #:**	
Email Address:		**Email Address:**	
Occupation:		**Occupation:**	
Full-Time Student? (Y/N):		**Full-Time Student? (Y/N):**	
Legally Blind? (Y/N):		**Legally Blind? (Y/N):**	
Dependent of Someone Else? (Y/N)		**Dependent of Someone Else? (Y/N)**	
Driver's License: State:		**Driver's License: State:**	
Number:		Number:	
Issue Date:		Issue Date:	
Expiration Date:		Expiration Date:	
IRS Identity Protection PIN? If Yes, #		**IRS Identity Protection PIN? If Yes, #**	
Date of Death:		**Date of Death:**	

Mailing Address: Street: __________ Apt.: ______

City: __________ State: __________ Zip Code: __________

In Care of Name: (if a guardian appointed or taxpayer is deceased): __________

SECTION 2 - DEPENDENTS

Any Dependents? If so, how many? # ______ If more than 3, include on page 5, or by attachment.

	Dependent 1	**Dependent 2**	**Dependent 3**
First Name:			
Middle Name:			
Last Name:			
Social Security #:			
Relationship:			
Date of Birth:			
New Dependent for 2024? (Y/N)			
Rotates Years with other Parent? (Y/N)			
Over 18, under 24 & Fulltime Student? (Y/N)			
If Under Age 13 at December 31, 2024, did you pay After School or Daycare Expenses in 2024?			
Amount of Expense:			
Caregiver name:			
Caregiver EIN/SSN:			

SECTION 3 - INCOME

Did you buy/sell Real Estate, Collectibles, Timber,or other Investments during 2024 NOT INCLUDED on an IRS Form 1099, on an attached Sch C, Sch E, or Sch F? (Yes/No) ______
If Yes, attach Closing Statements, Form 1099-S, or other Sales Proceeds and Cost Basis information.

Did you buy/sell virtual currency NOT INCLUDED in the above IRS Forms? (Yes/No) ______
If Yes, attach summary of all gains and losses of virtual currencies for the year.

Did you have authority over or receive any income from foreign sources? (Yes/No) ______
If yes, please attach all forms, statements or confirmations

For the Below Income included on IRS Forms - List By Sender & Attach the Form
(DO NOT list by dollar amount below. IRS Forms sent to you were also sent to the IRS. Therefore, we need the actual Forms.)

W-2 (Wages & Salary): [Indicate Current Employer with "(C)"]
1) ______ 3) ______
2) ______ 4) ______

W2-G (Gambling Income):
1) ______ 2) ______

1099-R (Retirement Plan Distributions): Any "Qualified Charitable Distributions"?(Y/N) ______
1) ______ 3) ______
2) ______ 4) ______

1099-DIV (Dividends):
1) ______ 3) ______
2) ______ 4) ______

1099-INT (Interest):
1) ______ 3) ______
2) ______ 4) ______

1099-G (State Refunds or State Unemployment):
1) ______ 2) ______

1099-Misc or 1099-NEC (Non-employee Compensation, Rent, Royalties or Other Income)*: (if over 2, attach list)
1) ______ 2) ______

1099-SSA (Social Security):
Primary (Yes/No) ______ Spouse (Yes/No) ______

K-1 (Partnership, S Corp, Estate or Trust): If more than 4, please attach full list and all K-1 Forms
1) ______ 3) ______
2) ______ 4) ______

1099-B (Sale of Stock OR from Investment Brokerage Statements Consolidated 1099):
1) ______ 3) ______
2) ______ 4) ______

Alimony: $ ______
Circle whehter (Paid to) or (Received by): Primay or Spouse: ______
Ex-spouse Name ______ Ex-spouse SSN: ______
Is this Alimony taxable/deductible?(Y/N) ______ Date of Divorce: ______

Gambling Income NOT INCLUDED on Forms W2-G: $ ______

SECTION 4 - Other Income & Adjustments to Income

Contributions To IRA, SEP or Roth IRA For 2023: (Attach **Form 5498** or other confirmation)

Account Type: ________ By Primary or Spouse: ________ $ ________

Account Type: ________ By Primary or Spouse: ________ $ ________

Contributions To HSA, MSA or FSA accounts: (Attach **Form 5498** or other confirmation)

Account Type: ________ By Primary or Spouse: ________ $ ________

Account Type: ________ By Primary or Spouse: ________ $ ________

Distributions From HSA, MSA or FSA accounts: (Attach **Form 1099-SA** or other confirmation)

Account Type: ________ By Primary or Spouse: ________ $ ________

Account Type: ________ By Primary or Spouse: ________ $ ________

Student Loan Interest Paid: (Attach **Form 1098E** or other confirmation)

By Primary or Spouse: ________ $ ________

By Primary or Spouse: ________ $ ________

Gambling Losses (Cannot exceed total gambling income included):

By Primary or Spouse: ________ $ ________

By Primary or Spouse: ________ $ ________

Were you an Educator with out-of-pocket classroom expenses? If Yes, amount ($300 or less): $ ________

Did you, or any Dependents, pay College Tuition? If Yes, attach Form 1098T from the college. # ________

Contributions To 529 Qualified Tuition Plan: (Attach Statement From State Plan or other confirmation)

By Primary or Spouse: ________ $ ________

By Primary or Spouse: ________ $ ________

Distributions From 529 Qualified Tuition Plan: (Attach **Form 1099-QTP** or other confirmation)

By Primary or Spouse: ________ $ ________

By Primary or Spouse: ________ $ ________

Online purchases that you were NOT charged any state sales taxes? (Yes/No) ________

This is required by the state. If so, please provide the total purchases: $ ________

SECTION 5 - ESTIMATED TAX PAYMENTS

Did you make any Quarterly Estimated Tax Payments?

(Paid By direct check or on-line. DO NOT include amounts withheld on W-2, 1099R, 1099-SSA, or other IRS Form above.)

Period:	**Date paid:**	**Amount Paid:**	**Period:**	**Date paid:**	**Amount Paid:**
IRS 1st Qtr.		$	State 1st Qtr.		$
IRS 2nd Qtr.		$	State 2nd Qtr.		$
IRS 3rd Qtr.		$	State 3rd Qtr.		$
IRS 4th Qtr.		$	State 4th Qtr.		$

SECTION 6 - INCOME TAX REFUNDS OR INCOME TAX PAYMENTS

If DUE a TAX REFUND, Direct Deposited?(Y/N) ________

If Yes, Account Information: Financial Institution/App Name: ________

Routing Number: ________

Account Number: ________

If No, Deliver By: Mail Check: ________ ________

If TAX is OWED, do you want the tax drafted from the account above? (Yes/No) ________

If No, you are responsible to make payment by check mailed, or online payment made, by due date.

SECTION 7 - MANNER OF COMPLETED TAX RETURN DELIVERY

Completed return will be delivered to you in the manner received, unless you request a different method.

Method of Delivery: Email: ________ Portal: ________ Pick Up: ________ In Person Review: ________

SECTION 8 - PAYMENT OF TAX PREPARATION FEES

Preparation Fees of $300 may be paid by cash, check or credit card.

Completed tax return will NOT be filed until all Preparations Fees are paid and Signature Forms received.

ADDITIONAL INFORMATION & QUESTIONS?

Do you have other possible income or expenses that has not been included in previous pages?

Do you have any questions about this year's tax return or taxes in general?