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## **Below is our 2024 Tax Organizer. Please complete this form to the best of your ability as our team will use this to help in the tax preparation process. If you are unsure of the answer to any of these questions or if they do not apply to you, please leave them blank. If you have any questions as always feel free to reach out to contact@milestonecpas.com.**

**Personal Information Yes No**

* Did your marital status change during the year?
* If yes, explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Did you live separately from your spouse during the last six months of the year?
* Did your address change from last year?
* Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been

a victim of identity theft? If yes, attach the IRS letter for filing returns in 2024.

**Dependent Information Yes No**

* Were there any changes in dependents from the prior year?
* If yes, explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Do you have any children under age 19 or a full-time student under age 24 with

unearned income in excess of $2,500?

* Do you have dependents who must file a tax return?
* Did you provide over half the support for any other person(s) other than your

dependent children during the year?

* Did you pay for childcare while you worked, looked for work, or while a

full-time student?

* Is there any other person(s) who lived with you more than half the year but not

claimed by you last year?

* If you are divorced or separated from a child(ren), do you have a divorce decree

or other form of separation agreement which establishes custodial responsibilities?

* Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or

have they been a victim of identity theft? If yes, attach the IRS letter for use during

2024 tax return filing.

**Purchases, Sales and Debt Information Yes No**

* Did you start a new business or purchase rental property during the year?
* Did you sell, exchange, or purchase any assets used in your trade or business?
* Did you acquire a new or additional interest in a partnership or S corporation?
* Did you sell, exchange, or purchase any real estate during the year?
* Did you purchase or sell a principal residence during the year?
* Did you acquire or dispose of any stock during the year?
* Did you take out a home equity loan this year?
* Did you refinance a principal residence or second home this year?
* Did you sell an existing business, rental, or other property this year?
* Did you have any debts canceled or forgiven this year, such as a home mortgage or

student loan(s)?

* Did you purchase a new or previously owned Clean vehicle this year that is eligible

for the new clean vehicle credit? If yes, attach the vehicle statement from the dealer.

**Income Information Yes No**

* Did you have any foreign income or pay any foreign taxes during the year, directly

or indirectly, such as from investment accounts, partnerships or a foreign employer?

* Did you receive any income from property sold prior to this year?
* Did you receive any unemployment benefits during the year?
* Did you receive any awards, prizes, hobby income, gambling or lottery winnings?
* Did you receive any income considered to be nonemployee compensation?
* Did you receive a Form 1099-K, 1099-MISC, 1099-NEC, or other income statement

for work done in what is commonly referred to as the "gig" economy?

* Do you expect a large fluctuation in income, deductions, or withholding next year?
* Did you have any sales or other exchanges of digital assets (including from an

airdrop or a hard fork, or used digital assets to pay for goods or services?

**Retirement Information Yes No**

* Did you receive any Social Security benefits during the year?
* Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP,

401(k), or other qualified retirement plan?

* Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP,

401(k), or other qualified retirement plan?

**Education Information Yes No**

* Did you have any educational expenses during the year on behalf of yourself,

your spouse, or a dependent?

* Did you make any withdrawals from an education savings or 529 Plan account?
* Did you make any contributions to an education savings or 529 Plan account?
* Did you pay any student loan interest this year?

**Health Care Information Yes No**

* Did you have qualifying health care coverage, such as employer-sponsored coverage

or government-sponsored coverage (i.e. Medicare/Medicaid) for your family?

"Your family" for health care coverage refers to you, your spouse if filing jointly, and

anyone you can claim as a dependent.

* Did you enroll for lower cost Marketplace Coverage through healthcare.gov under

the Affordable Care Act?

* Did you make any contributions to a Health savings account (HSA) or Archer MSA?
* Did you receive any distributions from a Health savings account (HSA), Archer

MSA, or Medicare Advantage MSA this year?

* Did you pay long-term care premiums for yourself or your family?

**Itemized Deduction Information Yes No**

* Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
* Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)?

If yes, please provide evidence such as a receipt from the donee organization, a

canceled check, or record of payment, to substantiate all contributions made.

* Did you donate a vehicle or boat during the year?
* Did you pay real estate taxes for your primary home and/or second home?
* Did you pay any mortgage interest on an existing home loan?
* Did you make any major purchases during the year (cars, boats, etc.)?
* Did you make any out-of-state purchases (by telephone, internet, mail, or in person)

for which the seller did not collect state sales or use tax?

**Miscellaneous Information Yes No**

* Did you make gifts of more than $18,000 to any individual?
* Did you utilize an area of your home for business purposes?
* Did you retire or change jobs this year?
* Did you pay any individual as a household employee during the year?
* Did you make energy efficient improvements to your main home this year?
* Did you have a financial interest in or signature authority over a financial account

such as a bank account, securities account, or brokerage account, located in a

foreign country?

* Do you have any foreign financial accounts, foreign financial assets, or hold

interest in a foreign entity?

* Do you plan to become an owner or control at least 25% of a company's ownership

interests for a company registered with a secretary of state or similar office for the

first time after January 1, 2024?

* Did you receive correspondence from the State or the IRS?
* If yes, explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Do you have previous years of tax returns that are either unfiled or filed with

unpaid balances due?

**Need Assistance with Your Tax Organizer?**

If you have any questions or need help navigating your tax organizer, we're here to assist you. Please don't hesitate to reach out to us directly to schedule an appointment with one of our experienced tax professionals. We're committed to making the process as smooth and stress-free as possible.

You can contact us by phone or use the link provided below to schedule an appointment with us, and we'll be happy to guide you through the next steps.

<https://calendly.com/milestonecpas/individual-tax-preparation>

We look forward to working with you!

Best regards,

**Milestone Certified Public Accountants Inc.**

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