General Information Spouse Taxpayer First Name Middle Initial Last Name Suffix Social Security Number . . . Date of Birth Date of Death . . . Check ("X") which phone number to list on return. Home Phone Work Phone Cell Phone Fax Number Legally Blind Totally Disabled Claimed as a Dependent . . Presidential Election Fund (\$3) . Occupation E-mail address State of Residence as of 12/31 . . County of Residence as of 12/31. School District as of 12/31 . . . Sales tax rate of locality in 2024 . _ If Part Year, Period of Residency . to Additional information is being requested this filing season in an effort to combat stolen-identity tax fraud. Please provide the requested information from the driver's license or state-issued identification card. Providing the information could help process state returns faster. Driver's license OR State Issued ID Driver's license OR State Issued ID ID issuing state ID issue date _ ID expiration date . Filing Status Status on 2023 return: Status as of 12/31/2024: Single Enter ("X") in the box 2 Married filing joint Married filing separately (Enter spouse's name and SSN above) Head of Household Non-dependent name: Non-dependent SSN: **5** Qualifying surviving spouse (QSS) Year spouse died Taxpayer's Address Street Apt/Suite : ____ State City Zip Code If address is in a foreign country, enter that country . . . Foreign province/county . . ____ Foreign postal code If a bona fide resident of a U.S. territory, enter territory . . **Preparer's Information** Preparer's name Firm's name Street State **Attestation and Signature:** To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records. Sign Date

here

			Name SSN
			Questions
Yes	No		Personal Information
		1	Did any births, adoptions, marriages, divorces, or deaths occur in your family since last year?
		2	Did you purchase or sell your principal residence or did your address change?
		3	Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return?
		4	Were you in a Registered Domestic Partnership, civil union or same-sex marriage during 2024?
		5	Were either you or your spouse in the military or National Guard?
		6 7	Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax correspondence?
		'	Have you or your spouse been an identity theft victim and given an identity theft protection six digit PIN by the IRS?
Yes	No		<u>Dependents</u>
		1	Are there any changes in your dependents from last year?
		2	Did you have any children under 19 (or 24 if a full time student) who received more than \$1,250 in investment income?
		3	Did you pay education expenses for your dependent children?
		4 5	Did anyone in your family receive a scholarship of any kind during 2024? Did you pay any dependent care expenses for a child or a parent?
		6	Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent?
		7	Are all of your dependents either US residents or citizens?
		8	If you answered YES to question 5, provide dependent care statement from your child(ren)'s care provider
			.,
Vaa	NI.		Health Care Coverage
Yes	No	1	Health Care Coverage Did you or a member of your family have minimum essential coverage in 2024? (The entity that provided the coverage
		•	may have sent you a Form 1095-A, 1095-B, or 1095-C, that lists individuals in your family who were enrolled
			in minimum essential coverage and shows their months of coverage.)
			in minimum coscinario overage and shows their months of coverage.)
Vaa	NI.		Income (In 2024, did you on your angues have any of the following)
Yes	No		Income (In 2024, did you or your spouse have any of the following?) Wages? (include form(s) W-2)
		1 2	Non-employee compensation? (include form(s) 1099-NEC)
		3	Miscellaneous Income? (include form(s) 1099-MISC)
		4	Interest income? (include form(s) 1099-INT)
		5	Dividend income? (include form(s) 1099-DIV)
		6	Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account?
		7	Gambling income? (include form(s) W-2G). Be sure to include any gambling expenses.
		8	Social security or Railroad Retirement benefits? (include form(s) SSA-1099 & RRB-1099)
		9	Did you receive a state or local refund, or a refund of any other deduction you itemized in a prior year? (attach 1099-G)
	_	10	Disability income? (include form(s) W-2 or 1099)
		11	Unemployment compensation? (include form(s) 1099-G)
		12	Alimony?
		13	Did you receive tip income NOT reported to your employer?
		14 15	Did you receive payments from a Long-Term Care insurance contract?
	_	15 16	Did you barter your services for goods or services from someone else? Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp?
		17	Did you receive employer-provided adoption benefits for a previous year?
		18	Did you cash in any U.S. savings bonds?
		19	Did you make a loan to someone at an interest rate below market rate?
		20	Did you receive a housing allowance for ministerial services you provided?
		21	Did you receive any income not reported in this Organizer?
		22	Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)?
		23	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?
Yes	No		Foreign Reporting
		1	Did you have an interest in or signature authority over a financial account in a foreign country?
		Ž	Were you the grantor of or transferor to a foreign trust?
		3	Did you receive income from a foreign source or pay taxes to a foreign government?
Yes	No		Retirement & Other Plans
		1	Did you receive any distributions from a retirement plan? (Include form(s) 1099-R)
	\Box	2	Did you rollover a retirement plan distribution into another plan?
		3	Did you convert a traditional IRA to a Roth IRA?
		4	Did you make a contribution to a retirement plan? (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
		5	Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account?
		6	Did you receive a distribution from an HSA, Archer MSA or Medicare Advantage MSA (Include form(s) 1099-SA)
	Ш	7	Did you make any contributions to an HSA (Health Savings Account) in 2024?
		8	Did you receive a qualified disaster distribution in 2024?

	9	Did you receive an early distribution for a qualified birth or adoption distribution?
W = =	NI -	Boundary Color Color and Large
Yes	No	Purchases, Sales, Gains and Losses
		Did you exchange any securities or investments for something other than cash?
	2	Do you have any short sales, commodity sales, or straddles?
	3	Did you receive Form 2439?
	4	Did you buy or sell any bonds?
	5	Did you receive stock from a stock bonus plan with your employer?
	6	Did you sell any other personal assets at a gain?
	7	Did you sell any real estate (other than your home) during the year?
	8	Did you sell any assets using the installment method?
	9	Did you receive proceeds from a prior year installment sale?
	10	
	11	
	12	
	13	
	14	, ,
	15	·
	16	Did you puchase any items acquired out of state, online or by mail order that did not include sales tax?
V	NI a	Dusiness and Dantal Dusy outs Income 9 Deductions
Yes	No	Business and Rental Property Income & Deductions
		If you own rental property, do you qualify as a Real Estate Professional?
	2	Did you start or acquire a new business?
	3	Did you sell any part of an existing business, or sell business assets?
	4	Did you cease operating any business or rental property?
	5	Did you remove any of your business assets for personal use?
	6	Did you use part of your home for business purposes?
	7	Did you make any contributions to a Keogh or a self-employed SEP plan for 2024?
	8	Do you pay for any health or long term care insurance through your business?
	9	If you or your spouse are self-employed, are either of you covered under an employer's health plan?
	10	
	11	
	12	Did you receive income from raising animals or crops?
Yes	No	Other Deductions
	1	Did you use your car on the job (other than to and from work)?
	2	Did you work out of town for part of the year?
	3	Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?
	4	Did you incur any travel and entertainment expenses for business purposes?
	5	Did you pay expenses for the care of your child or other dependent so you could work?
	6	Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024?
	7	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024?
	8	Did you contribute less than an entire interest in any property to charity?
	9	Did you refinance a mortgage or take out a home equity loan during 2024?
	10	
	11	
	12	, , , ,
	13	
	14	
	15	·
	16	Did you donate a vehicle?
Yes	No	Miscellaneous
	1	Did you make gifts of more than \$17,000 to any one person?
	2	Did you engage the service of any household employees?
	3	Did your bank account information change within the last twelve months?
	4	Do you want to allocate \$3 to the Presidential Election Campaign Fund?
	5	Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
	6	Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2024?
	7	Did you claim a First-time Homebuyer Credit for a home purchased in 2008?

	8	Was there a disposition or change in use of your ma	ain home for which you claimed t	the First-time Homebuyer Credit?
Yes	No	Return preparation and filing Do you want to e-file your return? If you are due a refund, how do you want to receive Check sent to you in the mail Apply to next year's estimates Direct deposit (please provide voided blank If you owe taxes, how do you want to pay them? Paper check sent with my return Direct debit (please provide a voided blank Do you want to allow your tax preparer to discuss the lift no, enter another person (if desired) to be allowed Designee's	Other quick check) Type of account Credit card Installment check) Type of account is year's return with the IRS?	Agreement : Checking Savings
		name	Number	Number (5 digit PIN)

Name					SSN			
Federal, State and Local Estim	ated Taxes I	Paid						
Federal Estimates								
Futon Doument Information			iler and/or Jo				ly Payments	4
Enter Payment Information			Date Paid	Amount		Date Paid	Amou	unt
1 Overpayment from last year					1			
2 First quarter payment3 Second quarter payment					2 3			
, , ,					3 -			
4 Third quarter payment					- 5 -			
5 Fourth quarter payment6					6			
_					7 7		\wedge	
State Estimates								
Enter two-letter state abbreviation	State		State		State		State	
Enter Payment Information	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
1 Overpayment from last year . 1								
2 First quarter payment 2								
3 Second quarter payment 3								
4 Third quarter payment 4	,							
5 Fourth quarter payment 5								
6 6								
7 7								
8 8								
Local Estimates								
Enter locality name	Locality	7	Locality		Locality		Locality	
Enter Payment Information	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
1 Overpayment from last year . 1								
2 First quarter payment 2								
3 Second quarter payment 3								
4 Third quarter payment 4								
5 Fourth quarter payment 5								
6								
77								
88								

Dependent Information No. of Months In Home Last Name	Name				S	SN					
No. of Months Amount Paid Student or Education Dependent Output Date of Full- time Paid Not a for Dependent Citizen Student or Education Dependent		ormation									
in Home Date of for Dependent Citizen Student or Education Dependent	•								Enter "X"	' if applicab	le
First Name Last Name in 2024 Relationship Birth SSN Care Expenses Disabled Expenses this Year First Name Last Name in 2024 Relationship Birth SSN Care Expenses Disabled Expenses this Year					5		Amount Paid	US	Full- time	Paid	Not a
TISLIVAINE Last Ivalite III 2024 (Voiatorism) Diriti 30N Cate Expenses Unistree Last Ivalite III 2024 (Voiatorism) Diriti 30N Cate Expenses Unistree III 2024 (Voiatorism) Diriti 30N Cate Expenses Un	Eiret Namo	Last Nama				QQNI	for Dependent	Citizen	Student or	Evpopeos	Dependent this Year
	riist ivaille	Last Name	111 2024	Relationship	DII III	3311	Care Expenses		Disabled	Expenses	uns real
								+			\vdash
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	Name					SSN	
Self	- E-Employed Business Inco	me and	d Expenses ((Schedule C)			
	Enter "X" in one box:	_	Spouse	,			
G	eneral Information						
	Employer Identification Number			(do no	t enter S	ocial Security Numbe	er)
	Principal business or profession						
	Business name						
	Business address						
	City				_ Sta	te	Zip
	Foreign Country						
	Foreign Province/State				Pos	stal Code	
G	•	(" where ap	· <u>-</u>				
1	Accounting Method	Casl	h Accrua	I . Other (Sp	ecify)		<u> </u>
2	Did you "materially participate" in this	business	? Yes	No			
3	Check ('X') if you started or acquired	this busin	ess in 2024.				
4	Did you make any payments in 2024	that would	d require you to file	e Form(s) 1099?		Yes	No
В	usiness Income					Current Year	Prior Year
	* Report statutory income as W-2 inc Gross receipts or sales not reported		099 or Form W-2			Amount	Amount
5	Gross receipts of sales not reported t	JII I OIIII I	1033 OF 1 OF 11 W-2		5		
6					6		
7					7		
8					8		
9					9		
10					10		
11					_ 11		
12					12		
13					_ 13		
14	La accesa con anta di an 4000 MICO				14		
15 16	Income reported on 1099 MISC Gross amount of payment card/third						
17	Professional gambler winnings from I				. 17		
18	Gross installment sales less cost of g						
19	Returns and allowances						
20	Other income				. 20		
In	ventory (Enter "X" where applic	able)					
21	Method(s) used to value closing inve	ntory	Cost	Lower of cos	t or mark	et Other	
22	Any change in determining quantities	, costs, or	r valuations betwe	en opening and clo	sing inve	ntory?	Yes No
						Current Year	Prior Year
00					00	Amount	Amount
23	Inventory at the beginning of year . Purchases less cost of items withdraw						
24 25	Cost of labor	•					
26	Materials and supplies						
27	Other Costs						
28	Inventory at end of year				. 28		
۸.	ssets Placed in Service This Year					Date Placed	Purchase
A	Description:					In Service	Amount
Α					_ A		
В					В		
С					_ с		
D					_ D		
E					_ E		
F					_ F		
G					G		1

	Name	SS	SN	
	Business			
Self	-Employed Business Expenses Cont. (Schedule C)			
	p ,		Current Year	Prior Year
Expe	nses		Amount	Amount
29	Advertising	29		
30	Contract labor	30		
31	Commissions and fees	31		
32	Depletion	32		
33	Employee benefit programs (other than on line 39)	33		
34	Insurance (other than health)	34		
	Interest:			
35	Mortgage (paid to banks, etc.)	35		
36	Other	36		
37	Legal and professional services	37		
38	Office expense	38		
39	Pension and profit-sharing plans	39		
	Rent or Lease:			-1
40	Machinery rental or lease	40		
41	Equipment rental or lease	41		
42		42		
43		43		
44		44		
	Other business property rental or lease		_	
45		45		
46		46		
47		47		
48	Repairs and maintenance	48		
49	Supplies (not included in inventory cost of goods sold)	49		
50	Taxes and licenses	50		
	Travel and Meals:			
	Travel			T
51		51		
52		52		
53		_ 53		
54	Mode	54		
	Meals Finter "V" in the bey if subject to DOT hours of comiles limits.			
55	Enter "X" in the box if subject to DOT hours of service limits	55		
56	Meals subject to the Standard meal allowance that are 100% deductible after			
	the federal M&IE rate is applied	56		
	Meals subject to percentage limitation			T
57		57		
58		58		
59		59		
60		60		
61		61		
	Meals not subject to percentage limitation (100% allowed)			
62	AV	62		
63		63		
64	V	64		
65		65		
66	Utilities	66		
67	Wages	67		
_	Other Expenses:	_		
68		68		
69		69		
70		70		
71		71		
72		72		
73		73		
74		74		
75		75		
76		76		

	Name			SSN	
	Business				
eh/	nicle Information (Schedule C)				
	_	Vehicle -		Vehicle -	
		Current Year Amount	Prior Year Amount	Current Year Amount	Prior Year Amount
1	Date vehicle was placed in service 1	Amount	Amount	Amount	Amount
2	Cost of vehicle				
3	Total miles driven for the year 3				
4	Business miles driven during the year 4				
5	Commuting miles included on line 3 5				
6	Parking fees and tolls 6				
7	Vehicle Interest				
8 Ad	Vehicle Personal Property tax 8 ctual Expenses				
9	Gasoline, oil and repairs 9				
10	Vehicle Insurance				
11	Vehicle registration fees				
12	Vehicle lease or rental				
13	13				
	_	Vehicle -	9	Vehicle -	
		Current Year Amount	Prior Year Amount	Current Year Amount	Prior Year Amount
1	Date vehicle was placed in service 1	Amount	Amount	Amount	Amount
2	Cost of vehicle				
3	Total miles driven for the year 3				
4	Business miles driven during the year . 4				
5					
6	Parking fees and tolls 6				
7	Vehicle Interest				
8 Ad	Vehicle Personal Property tax 8				
9	Gasoline, oil and repairs 9				
10	Vehicle Insurance				
11	Vehicle registration fees				
12	Vehicle lease or rental				
13	13				

	Name		SSN		
	Home Office Number Description of Home Office				
	Address				
	City		St	ate Zip	
	Check ("X") box:	Daycare			
Hon	ne Office Expenses		_		
۸.	ea of Home			Current Year	Prior Year
1		vely for business, regularly for daycare,	or for storage	Amount	Amount
	of inventory or product samples		1		
2 Da	Total area of home	d Nonexclusively for Daycare	2		<u> </u>
3	Multiply days used for daycare	during year by hours used per day	3		
4 Ex		ilable for daycare during year including business portion (Indirect)	4		
5	Casualty losses		5	*	
6					
7					
8					
9					
10					
11	Other Expenses:		11 _		
12	•		12a		
a b			12a 12b		
c			12c		
d			12d		
e			12e		
В	usiness Allocation:			Current Year Allocation %	Prior Year Allocation %
	Business 1:				
	Business 2:				
	Business 3:				
	Business 4:				
	usiness: Idditional expenses related to b	usiness portion only (Direct)		Current Year Amount	Prior Year Amount
13			13	-	
14	Excess mortgage interest		14		
15	Excess real estate taxes		15		
16	Insurance		16		
17	Rent		17		
18	Repairs and maintenance		18		
19	Utilities		19		
20	Other Expenses:		20a		
a b			20a 20b		
C			20c		
d			20d		
e			20e		

IRA	and Other Contribution Information			
Tradi	tional IRA Contributions	Output Value	Delan Valor	ī
Filer		Current Year Amount	Prior Year Amount	
1	Enter total traditional IRA contributions made for 2024	Amount	Amount	ĺ
2	Enter contributions, on line 1, made after 12/31/2024 and before 04/15/2024			ĺ
3	Enter value of all traditional IRAs on 12/31/2024			ĺ
4	Enter amount of any outstanding traditional rollovers as of 1/1/2024			ĺ
Spou	, -			
5	Enter total traditional IRA contributions made for 2024			ĺ
6	Enter contributions, on line 5, made after 12/31/2024 and before 04/15/2024 6			ĺ
7	Enter value of all traditional IRAs on 12/31/2024			ĺ
8	Enter amount of any outstanding traditional rollovers as of 1/1/2024			ĺ
				_
Roth	IRA Contributions	Current Year	Prior Year	ſ
Filer		Amount	Amount	
1	Enter 2024 Roth IRA contributions			
2	Enter value of all Roth IRAs on 12/31/2024			
Spou	se			
3	Enter 2024 Roth IRA contributions			
4	Enter value of all Roth IRAs on 12/31/2024			ĺ
SIMD	LE IRA	·	•	_
SIIVIF	LE INA	Current Year	Prior Year	Ì
Filer		Amount	Amount	ļ
1	Enter value of all SIMPLE IRAs on 12/31/2024			ļ
Spou	se			
2	Enter value of all SIMPLE IRAs on 12/31/2024			_
Educ	ation (Coverdell ESA)			
Filer		Current Year	Prior Year	
1	Enter 2024 Coverdell ESA contributions	Amount	Amount	Ì
2	Enter value of the Coverdell ESA on 12/31/2024			Ì
Spou				•
3 3	Enter 2024 Coverdell ESA contributions			ĺ
4	Enter value of the Coverdell ESA on 12/31/2024			
4	Efficie value of the Coverden ESA off 12/31/2024			
Othe		Current Year	Prior Year	ſ
Filer		Amount	Amount	
1	Repayment of qualified reservist distributions			İ
Spou				
2	Repayment of qualified reservist distributions			İ

SSN ____

Name

Name	SSN
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Medical and Dental - Itemized Deductions

	medi and Bentai - Remized Beddetions	•	Current Year Amount	Prior Year Amount
1	Prescription medications	1		
2	Fees for doctors, dentists, etc	2		
3	Fees for hospitals, clinics, etc	3		
4	Lab and X-ray fees	4		
5	Medical aids such as glasses, contacts, hearing aids, wheelchair, etc	5		
6	Medical equipment and supplies	6		
7	Medical mileage (number of miles driven)	7		
8	Medical parking, tolls and local transportation	8		
9	Lodging for medical purposes	9		
10	Health/Dental/Other ins. premiums (do not include self-employed plans)	10		
11	Long Term Care insurance premiums (taxpayer)	11		
12	Long Term Care insurance premiums (spouse)	12		
13	Expenses to stop smoking	13		
14	Health insurance premiums - coverage established under your business (1)	14		
15	Health insurance premiums - coverage established under your business (2)	15		
16	Long Term Care insurance premiums - coverage est. under your business (1) .	16		
17	Long Term Care insurance premiums - coverage est. under your business (2) .	17		
18		18		
19		19		
20		20		
21		21		
22	Insurance reimbursement for any medical and dental expense listed above	22		

Bank Account Information

	Bank Account 1	Bank Account 2	Bank Account 3
Account holder first or Business name			
Middle initial			
Last name			
Bank name			
Routing number			
Account number			
Type of account	Checking Savings	Checking Savings	Checking Savings
Account type	Personal Business	Personal Business	Personal Business
Will these funds be coming from/going to an account outside of the United States?	Yes No	Yes No	Yes No
Check ("X") to apply to ALL jurisdictions	∏AII	□ All	□ All
OR	OR	OR	OR
Check ("X") to apply to CERTAIN jurisdictions			

