2024 Individual Taxpayer Organizer



(See next page for Organizer)

BOLK TAX SERVICE CPA, LLC (314) 434-1040

Web: bolktax.com 13916 OLIVE BOULEVARD CHESTERFIELD, MO 63017

Email: info@bolktax.com

Taxpayer						Tax ID # *				
First Name	M.I.	Last	Name	Em	ail	I		IP PIN		
Occupation		Date o	of birth			Are you nev	Are you new to our firm? Yes No			
Address		City				State		Zip		
County		Prima	ry phone			Secondary p	hone			
Driver's License No.				Stai	te Issue	Date	Exp	. Date		
Spouse						Tax ID # *				
First Name	M.I.	Last	Name	Em	ail			IP PIN		
Occupation		Date o	of birth			Are you nev	v to our	firm?	Yes	No
Address (If different from Taxpayer)		City				State		Zip		
County		Prima	ry phone			Secondary p	hone			
Driver's License No.		1		Stai	te Issue	Date	Exp	. Date		
If you moved during 2024, enter your	previous address	3.				Date of mov	'e			
Marital status on 12/31/24: Single Were you divorced or separated durin <i>Note:</i> Individuals in registered domes	ng the year? Ye)	W	Vere there any	gistered Domesti deaths in the fan ed married for fe	nily?	Yes N	0	
Names of dependent children <i>Child's full name</i>	Tax ID #	÷ *	IP PIN		Date of birth	Months lived home in 2024		lationship		ollege ıdent?
Did any of the children have unearned Is it anticipated that a different taxpay					5	the children hav ent for tax year 2		oility? Yes N	Yes	No
Other dependents or people who liv	ed with you				I					
Name	<i>Tax ID</i> # *		IP PIN	1	Date of birth	Months lived in home in 2024	Relatio	onship	Inc	ome
Bank information: Use for Direct d	eposit of refund	Direc	t debit of balar	nce d	due Name of l	vank				
Checking Savings Routing tra	Checking Savings Routing transit number Account number									
Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.										
*A Tax ID # is a Social Security Number (SS	N), adoption taxpay	ver ident	ification number	r (AT	'IN), or an indiv	idual taxpayer ider	ntification	n number	(ITIN).

Questions—All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse—ask your preparer if you are unsure about a question.

No. Are either you or your spouse legally blind? Yes No. Date you receive allmony in 2024? Recipient's SSN Date of disorce or separation Yes No. Dold you purbase health insurance through a public exchange / marketplace? (Provide Form 1095-A.) The set of disorce or separation Yes No. Did you purbase health insurance through a public exchange / marketplace? (Provide Form 1095-A.) Yes No. Did you purbase an energy-efficient. hybrid, or electric vehicle? Yes No. Did you purbase an energy-efficient. hybrid, or electric vehicle? Yes No. Did you purbase an energy-efficient. hybrid, or electric vehicle? Yes No. Did you purbase of the military? State of readency Yes No. De you own or have financial interest in a foreign country? Foreign country Yes No. Were any children born or adopted in 2024? (Provide Form 1098-L.) Foreign country Yes No. Were any children born or adopted in 2024? (Provide Form 1098-L.) Foreign country Yes No. Were any children born or adopted in 2024? (Provide Form 1098-L.) Foreign country Yes No. Did yo				1 2 1			1				
Yes No Did you pay or receive alimony in 2024? Recipient's SSN Date of diroce or separation Yes No Did you pay or receive alimony in 2024? Recipient's SSN Date of diroce or separation Yes No Did you pay on yoon for or directive services (e.g., normay, housekeeper, cook, caretaker) in your home? Yes No Did you pay on yoon for or directive services (e.g., normay, housekeeper, cook, caretaker) in your home? Yes No Did you pay on yoon for did metains services (e.g., normay, housekeeper, cook, caretaker) in your home? Yes No Were you a citizen of or did you live in a foreign country? Foreign country Yes No Do you own or have financial interest in a foreign hank or financial account? Maximum ratue in 2024 5 Yes No Were any children horn or adopted in 2024? (Provide statement for other expenses). Yes No Were any children horn or adopted in 2024? (Provide statement for ther expenses). Yes No Were any children horn or adopted in 2024? (Provide statement for ther expenses). Yes No Did you pay any tuition for a private school for a dependent or take classes yoursel? Yes No Did you pay any tuititon for a private school for 2024?		Yes	No	Are either you or your spouse legally blind?							
Prior Prior Prior Prior Yes No Dd you purchase health insurance through a public oxchange/marketplace? (Provide Form 1095-A.) Yes No Will there be any significant changes in income or deductions next year, such as retirement? Yes No Did you purchase an energy-efficient, hybrid, or electric vehicle? Yes No Are you arounds of omestic services (e.g., nanny, housekeeper, cook, caretakee) in your home? Yes No Are you a member of the military? State of residency Yes No Do you own or have financial interest in a foreign country? Foreign country Yes No Were you a citizen of or did you live to allow your tax preparer or another person to discus your return with the IRS? Deleginte's inne Phole number Phole mumber Phole mumber Yes No Were any children born or adopted in 2024 (Provide statemont for other exprense) Yes in collage Yes No Were any children attending college? (Provide statemont for other exprense) Yes in collage Yes No Did you pay any tution for a private school for a dependent or take classes youscial? Yes in monterest \$ Yes No </td <td></td> <td>Yes</td> <td>No</td> <td colspan="7">Have you received any notice from the IRS or state revenue department within the past year? If yes, provide a copy.</td> <td></td>		Yes	No	Have you received any notice from the IRS or state revenue department within the past year? If yes, provide a copy.							
Yes No Will there be any significant changes in income or deductions next year, such as retirement? Yes No Did you pay anyone for domesitic services (e.g., namy, housekeper, cook, carelaker) in your home? Yes No Did you purtase an encrey-officient, bythid, or electric vehicle? Yes No Are you a member of the military? State of residency Yes No Are you a member of the military? State of residency Yes No Do you own or have financial interest in a foreign bank or financial account? Maximum value in 2024 \$ Yes No Do you own or have financial interest in a foreign bank or financial account? Maximum value in 2024 \$ Yes No Were any children born or adopted in 2024? (Provide statement for other expenses.) Yes No Were any children born or adopted in 2024? (Provide statement for other expenses.) Yes No Did you pay any utilion 6 Books \$ Student loan interest \$ Yes No Did you pay any utilion for a private school for a dependent or take classes yourscl? Student loan interest \$ Yes No Did you pay any utilion for a private school for a dependent or take classes yourscl? Student loan interest \$ <td< td=""><td></td><td>Yes</td><td>No</td><td></td><td></td><td>Recipient</td><td>'s SSN</td><td>Date of divorce or</td><td>[,] separat</td><td>tion</td><td></td></td<>		Yes	No			Recipient	's SSN	Date of divorce or	[,] separat	tion	
Yes No Are you a member of the military? State of residency Yes No Were you a citizen of or did you live in a foreign country? Foreign country Yes No Do you own or have financial interest in a foreign pank or financial account? Maximum value in 2024 \$ Yes No Would you like to allow your tax preparer or another person to discuss your return with the IRS? Designe's name Plant enumber Plant enumber Yes No Were any children born or adopted in 2024? (Provide statement for other expenses.) Yes No Were any children born or adopted in 2024? (Provide statement for other expenses.) Yes No Were any children born or adopted in 2024? (Provide statement for other expenses.) Yes No Did you pay any tuition for a private school for a dependent or take classes yourself? Student Amount paid \$ Manue num and address of school No Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable) Name and address of school Name any contributions to a 529 plan in 2024? If yes, provide details. Yes No Did you, or will you, contribute any money to an IRA for 2024? Traditional IRA		Yes	No	Did you purchase he							
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Yes No Do you own or have financial interest in a foreign bank or financial account? Maximum value in 2024 \$ Yes No Would you like to allow your tax preparer or another person to discuss your return with the IRS? Designes' mame Phone number PIN (any fice digits) Yes No Were any children horn or adopted in 2024? (Provide statement for other expenses.) Yes No Were any children attending college? (Provide form 1098-E). Yes No Were any children attending college? (Provide form 1098-E). Yes No Did you pay any tuition for a private school for a dependent or take classes yourselt? Student Name and address of school Environmentation of provider Mame and address of school EIN or SSN Address Did you nake any contributions to a 529 plan in 2024? If yes, provide details. Yes No Did you roll over any anounts from a retirement account in 2024? Traditional IRA Roth IRA Yes No Did you any investments become worthless or vere you a victim of investment theft in 2024? Yes Yes No Did you up any investments become worthless or vere you a victim of investment theft in 2024? Yes No <td></td> <td>Yes</td> <td>No</td> <td>Are you a member of</td> <td>f the military?</td> <td></td> <td>State of residency</td> <td></td> <td></td> <td></td> <td></td>		Yes	No	Are you a member of	f the military?		State of residency				
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Year in college Paid by you: Tuition \$ Books \$ Student loan interest \$ Yes No Did you pay any tuition for a private school for a dependent or take classes yourself? Amount paid \$ Name and address of school Amount paid \$ Amount paid \$ Name and address of school ELN or SSN Yes No Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable) Name and address of school ELN or SSN Address Amount paid \$ Yes No Did you and the any contributions to a 529 plan in 2024? If yes, provide details. Yes No Did you roll over any amounts from a refirement account in 2024? Traditional IRA Yes No Did you receive any income from an installment sale? Yes Yes No Did you are any investments become worthless or were you a victim of investment theft in 2024? Yes No Did you are a major purchase in 2024. So for 2024? Yes No Did you and any investments become worthless or were you a victim of investment theft in 2024? Yes No Did you and a areward, award, or payment for property or services); or (b) sell, exchange, or otherwise		Yes	No	Were any children bo	orn or adopted in 2024? (Proz	vide statemer	<i>it for other expenses.)</i>				_
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Yes No Did you, or will you, contribute any money to an IRA for 2024? Traditional IRA Roth IRA Yes No Did you roll over any amounts from a retirement account in 2024? Traditional IRA Roth IRA Yes No Did you sell or transfer any stock or sell rental or investment property? Yes No Did you receive any income from an installment sale? Yes No Did you have any investments become worthless or were you a victim of investment theft in 2024? Yes No Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (<i>Digital assets include cryptocurrencies, NFTs, and stablecoins</i>) Yes No Did you oy uo you plan to, contribute money by April 15, 2025 to an HSA for 2024? If yes, provide details. Yes No Did you any interest on a loan for a boat or RV that has living quarters? If yes, provide details. Yes No Did you aya sales taxes on a major purchase in 2024, such as a vehicle, boat, or home? Yes No Did you work from a home office or use your car for your business? Yes No Did you work from a home office or use your car for your business? Yes No Did you work from a home office or use your car for your business, or oth	ŀ	Yes	No		ontributions to a 529 plan in t	2024? If ves	provide details.				
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Income Worksheet

Provide to your preparer all Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, 1099-NEC, 1099-K, and other income reporting statements. Do not list dollar amounts for the following forms. Your preparer will report the appropriate amounts.

	e "T" for taxpayer, "S" for spouse, "J" for jo	oint			Pro	vide additional statemen	ts if mo	ore room is needed	
	W-2—Wage and Tax Statement				1				
T/S	Employer name			T/S Employer name					
	1)				4)				
	2)				5)				
	3)				6)				
Forms	1099-INT—Interest Income								
T/S/J	Name of issuer			T/S/J	Name of	f issuer			
	1)				4)				
	2)				5)				
	3)				6)				
Forms	1099-DIV—Dividends and Distributions								
T/S/J	Name of issuer			T/S/J	Name of	f issuer			
	1)				4)				
	2)				5)				
	3)				6)				
Forms	1099-R—Distributions From Pensions, An	nuities, Ret	irement	or Profit	-Sharing l	Plans, IRAs, Insurance C	ontract	s, Etc.	
T/S	Name of issuer			T/S	Name of issuer				
	1)				4)				
	2)				5)				
	3)				6)				
If the d	istribution is before age 59½, give a reason	to determin	e if an e	exception	to penalty	y applies.			
Tax-Exe	empt Interest (such as municipal bonds—	include state	ement)						
Payer		\$		Payer				\$	
Other I	ncome								
State ta	x refund		\$			Unreported tips		\$	
Unemp	loyment compensation		\$			Other \$			
Social Security (taxpayer)—provide SSA-1099 or RRB-1099			\$				\$		
Social Security (spouse)—provide SSA-1099 or RRB-1099			\$				\$		
Gambling income—provide Form W-2G			\$				\$		
Business income (see <i>Sole Proprietorship Tax Organizer</i>)						Stock sales	See "Sales and Exchange		
Rental income (see <i>Rental Property Tax Organizer</i>)				566			sheet" below.		
	s and Exchanges Works	heet							
	e information about sales of stock, real esta				th East	1000 P 1000 C			

Provide information about sales of stock, real estate, or other property, along with Forms 1099-B, 1099-S, or other supporting statements.

Description of property	Purchase date	Cost/basis	Sale date	Sale price
		\$		\$
		\$		\$
		\$		\$

Notes:

• When stock is sold, you will usually receive Form 1099-B, *Proceeds From Broker and Barter Exchange Transactions*, reporting the proceeds from the sale. However, your statement will not always provide the cost/basis information necessary to compute gain or loss. If the statement does not contain the cost/basis information, you must provide it. You may need to contact your broker for questions about cost/basis and purchase dates of your stock accounts.

• Often, "transfers" of stock or mutual funds within a brokerage account are actually sales of one type of stock and purchase of another. Even if you did not receive any cash from the transaction, you may have taxable gain or loss.

• If your stock dividends are automatically reinvested, the dividends will be taxable even though you did not receive any cash. The transaction is treated as if you had received cash and purchased additional stock. When the stock is sold, the amount reinvested over the years is taken into account. You may need to contact your broker for questions about the amount of reinvested dividends.

• If you sold property other than stock, your taxable gain or loss will be determined by your cost/basis. The cost/basis is usually the original purchase price plus improvements (the cost of repairs and maintenance are not taken into account for cost/basis).

Itemized Deductions Worksheet

Deductions must exceed \$14,600 Single, \$29,200 MFJ/QSS, \$21,900 HOH, or \$14,600 MFS to be a tax benefit.

include cost for dependents—do not include any expenses that were				Charitable Contributions. If over \$500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all contributions.				
Dentists	\$	Hospitals	\$	Monetary (cash, c	heck, credit card)		\$	
Doctors	\$	Insurance	\$	Noncash contribu	tions (FMV). Clot	thing or household		
Equipment	\$	Prescriptions	\$	items must be in §	good used conditi	on or better.	\$	
Eyeglasses	\$	Other	\$	Did you transfer f		A directly to a	¢	
Medical miles	:	@ 21¢	1		No	@ 14¢	\$	
		s paid for full or partia		Charitable mileag		@ 14¢		
		siness use of the hom				ected damage or loss	of property, or	
State withhold	0	224	Reported on W-2	a theft in a federa	lly-declared disas	ter area, provide deta		
	d taxes—paid in 2	024	\$	preparer. Yes	No			
Real estate tax			\$	Miscellaneous Itemized Deductions. Miscellaneous itemized				
Real estate tax			\$	deductions subject to the 2% AGI limitation are not deductible on federal return. However, these expenses may be deductible on you				
Personal prop	,		\$	return. For use of	ed expenses,			
Property tax r	efund—received i	n 2024	\$()) provide information on a separate sheet. Were any expenses re by your employer? Yes No				
Foreign tax pa	nid		\$	by your employer				
Other			\$	Dues	\$	Subscriptions	\$	
Other			\$	Investment	\$	Supplies	\$	
Other			\$	expenses Job education	\$	Tax mean face	\$	
	n 2024 from prior					Tax prep fees Tools	\$ \$	
	e interest or penal		\$	Job seeking	\$			
		ax paid during 2024?	Yes No Yes No	Legal fees	\$	Uniforms	\$	
Sales tax paid		oat, or home in 2024? e vaid \$ Date		Licenses	\$	Union dues	\$	
				Safety equipment		Other	\$	
Interest Paid. Do not include interest paid for full or partial business- use or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers.			Other Deductions. The following deductions are not subject to the 2 AGI limitation.					
Main home	\$	Equity loan	\$	Gambling losses	\$	Federal estate tax on IRD	\$	
Second home	\$	Equity loan	\$	Impairment-	\$	Other	\$	
		-	\$	related expenses	Ψ	Culti	Ψ	

Notes: • Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.

Work clothing is not deductible if adaptable for every day wear. Exception for safety equipment, such as steel-toe boots.

Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible.

Adjustments Worksheet Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum \$300 each. \$ *Health savings account (HSA).* Contributions for 2024 may be made through April 15, 2025. \$ (Only include contributions you made out-of-pocket). \$ Self-employed SEP, SIMPLE, and qualified plans. Contributions for 2024 may be made through April 15, 2025. Self-employed health insurance. Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer \$ coverage. \$ Penalty on early withdrawal of savings. IRA deduction. For traditional IRAs. Roth IRAs are not deductible. Contributions for 2024 may be made through April 15, 2025. \$ \$ Student loan interest. Paid for taxpayers and dependents. Moving expenses. Available only to members of the Armed Forces (or their spouses or dependents) on active duty that move pursuant to a military order and incident to a permanent change of station. Ask preparer Business expenses of reservists, performing artists, and fee-based government officials. Ask preparer \$ Other adjustments. Include description.

Estimated Tax Payments — Tax Year 2024

Installment	Date paid	Federal	Date paid	State
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2023 overpayment		\$		\$
Total		\$		\$
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Tax Preparation Checklist

Please provide the following documentation:

All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.

Form 1095-A (for health insurance purchased through a public exchange/marketplace), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).

If you are a new client, provide copies of last year's tax returns.

The completed Individual Income Tax Organizer. *Note:* If you choose not to fill out the organizer, you must at least answer the "Yes" or "No" questions under "Questions—All Taxpayers."

Copy of the closing statement if you bought, sold, or refinanced real estate.

Mileage amounts for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage. Detail of estimated tax payments made, if any.

Income and deductions categorized on a separate sheet for business or rental activities.

List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions. Copy of all acknowledgement letters received from charitable organizations for contributions made in 2024.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a duplicate copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer Spouse Date	Duine an Dalian		
	Taxpayer	Spouse	Date

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your express written permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.