# 2024 Individual Taxpayer Organizer Rental Property



(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	nail	I		IP PIN		
Occupation		Date of birth				Are you nev	Are you new to our firm? Ye			No
Address		City				State		Zip		
County		Prima	ry phone			Secondary p	hone			
Driver's License No.				Sta	te Issue	Date	Exp	. Date		
Spouse						Tax ID # *				
First Name	M.I.	Last	Name	Em	nail			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		Sta	te Issue	Date	Exp	. Date		
If you moved during 2024, enter your	previous address	3.				Date of mov	ve			
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	
<b>Names of dependent children</b> <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					2	the children hav ent for tax year 2		bility? Yes N	Yes o	No
Other dependents or people who liv	ed with you				1					
Name	<i>Tax ID</i> # *		IP PIN	1	Date of birth	Months lived in home in 2024	Relati	onship	Inc	ome
Bank information: Use for Direct d	eposit of refund	Direc	t debit of balar	nce c	due Name of l	bank		1		
Checking Savings Routing tra	nsit number				Account nu	mber				
Ask your tax preparer for information	about depositing	g a refu	nd into an IRA	acco	ount or splitti	ng the deposit in	to more	than one	acco	unt.
*A Tax ID # is a Social Security Number (SS	N), adoption taxpay	/er ident	ification number	r (AT	TN), or an indiv	idual taxpayer ider	ntificatio	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.

			1 2 1			1							
	Yes	No	Are either you or you	r spouse legally blind?									
	Yes	No	Have you received a	He child you of your spouse regardy bind. Have you received any notice from the IRS or state revenue department within the past year? If yes, provide a copy.									
	Yes	No	Did you pay or received Paid Received		Recipient's SSN		Date of divorce or separation						
	Yes	No	Did you purchase he	nealth insurance through a public exchange/marketplace? (Provide Form 1095-A.)									
IXES	Yes	No	Will there be any sign	there be any significant changes in income or deductions next year, such as retirement?									
LIFESTYLE & TAXES	Yes	No	Did you pay anyone	d you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home?									
STYLI	Yes	No	Did you purchase an	you purchase an energy-efficient, hybrid, or electric vehicle?									
TIFE	Yes	No	Are you involved in	bankruptcy, foreclosure, repos	ssession, or	had any debt (including	g credit cards) cancelle	d?					
	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 co	ountry?	Foreign country							
	Yes	No	Do you own or have	financial interest in a foreign	bank or fin	ancial account? Maximu	m value in 2024 \$						
	Yes	No	Would you like to all Designee's name	ow your tax preparer or anoth Phor	ner person <i>1e number</i>	to discuss your return w	ith the IRS? PIN (any five digits)						
	Yes	No	Were any children bo	orn or adopted in 2024? (Provid	de statement	t for other expenses.)							
	Yes	No	Were any children at	tending college? (Provide Form	ı 1098-T anı	d Form 1098-E.)							
			Year in college	Paid by you: Tuition \$		Books \$	Student loan interest \$						
LION				Paid by student: Tuition \$		Books \$	Student loan interest \$						
CHILDREN & EDUCATION	Yes	No	Did you pay any tuit	ion for a private school for a c	lependent	or take classes yourself?							
& EL			Student				Amount paid \$						
DREN			Name and address of so	hool									
CHILL	Yes	No	Did you pay for child	l or dependent care so you co	uld work o	or go to school? (Provide s	statement if applicable)						
			Name of provider				EIN or SSN						
			Address				Amount paid \$						
	Yes	No	Did you make any co	ontributions to a 529 plan in 20	024? If yes,	provide details.							
	Yes	No	Did you, or will you,	contribute any money to an I	RA for 202	4?	Traditional IRA	Roth IRA					
	Yes	No	Did you roll over any	amounts from a retirement a	ccount in 2	2024?							
ITS	Yes	No	Did you sell or trans	er any stock or sell rental or in	nvestment	property?							
INVESTMENTS	Yes	No	Did you receive any	income from an installment sa	ale?								
IVES	Yes	No	Did you have any inv	vestments become worthless o	or were you	a victim of investment	theft in 2024?						
5	Yes	No	Were you granted, or	did you exercise, any employ	zee stock of	ptions during 20242	Did you have any investments become worthless or were you a victim of investment theft in 2024?						
	Yes					phons during 2024.							
	105	No	Did you (a) receive (a of a digital asset (or a	ns a reward, award, or paymen financial interest in a digital	nt for prop	erty or services); or (b) s	ell, exchange, or other urrencies, NFTs, and sta	wise dispos blecoins)					
ß	Yes	No No	of a digital asset (or a	ns a reward, award, or paymen financial interest in a digital lan to, contribute money by A	nt for prop asset)? ( <i>Di</i> §	erty or services); or (b) so gital assets include cryptoc	urrencies, NFTs, and sta	wise dispos blecoins)					
STIONS			of a digital asset (or a Did you, or do you p	financial interest in a digital	nt for prop asset)? ( <i>Dig</i> april 15, 202	erty or services); or (b) si gital assets include cryptoc 25 to an HSA for 2024? If	<i>urrencies, NFTs, and sta</i> yes, provide details.	wise dispos					
TEDUCTIONS	Yes	No	of a digital asset (or a Did you, or do you p Did you pay any inte	financial interest in a digital lan to, contribute money by A	nt for prop asset)? ( <i>Dig</i> pril 15, 202 7 that has li	erty or services); or (b) si gital assets include cryptoc 25 to an HSA for 2024? If iving quarters? If yes, pro	<i>urrencies,</i> NFTs, and sta yes, provide details. ovide details.	wise dispos blecoins)					
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HOME BUSINESS	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	No No No No No No No No No	of a digital asset (or a Did you, or do you p Did you pay any inte Did you pay sales tay Did you make any ch Did you work from a Did you work from a Did you receive inco Do you own a busine Did you purchase or If you sold a home, d Did you refinance a n Did you use any mon Did you make any ne	a financial interest in a digital lan to, contribute money by A rest on a loan for a boat or RV ces on a major purchase in 202 aritable contributions in 2024 home office or use your car for me from a sharing/gig econor rest or an interest in a partnersh sell a main home during the y id you claim the First-Time Ho nortgage or take a home equifi- tgage loan proceeds for purpo- tes energy-efficient improvem	nt for prop asset)? ( <i>Di</i> spril 15, 202 7 that has li 24, such as ? If yes, pro or your bus my activity hip, corpor ear? If yes, pomebuyer ( ty loan? If y osses other t	erty or services); or (b) se gital assets include cryptoc 25 to an HSA for 2024? If iving quarters? If yes, pro- a vehicle, boat, or home? ovide details. siness? r (e.g. Airbnb, Uber, etc.)? ration, LLC, farming acti provide closing stateme Credit when it was purch yes, provide closing state than to buy, build, or sub ir home? If yes, provide	urrencies, NFTs, and sta yes, provide details. ovide details. ? vities, or other venture nt. nased? If yes, provide o ement. ostantially improve yo	etails.					
Sta	Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	No No No No No No No No Mo matio	of a digital asset (or a Did you, or do you p Did you pay any inte Did you pay sales tay Did you make any ch Did you work from a Did you work from a Did you receive inco Do you own a busine Did you purchase or If you sold a home, d Did you refinance a n Did you use any mon Did you make any ne	a financial interest in a digital lan to, contribute money by A rest on a loan for a boat or RV tes on a major purchase in 202 aritable contributions in 2024 home office or use your car for me from a sharing/gig econor rest or an interest in a partnersh sell a main home during the y id you claim the First-Time Ho nortgage or take a home equif tgage loan proceeds for purpore we energy-efficient improvem int Part-year resident N	nt for prop asset)? ( <i>Dig</i> pril 15, 202 7 that has li 24, such as ? If yes, pro or your bus my activity hip, corpor ear? If yes, omebuyer ( ty loan? If osses other t ents to you	erty or services); or (b) se gital assets include cryptoc 25 to an HSA for 2024? If iving quarters? If yes, pro- a vehicle, boat, or home? ovide details. siness? r (e.g. Airbnb, Uber, etc.)? ration, LLC, farming acti provide closing stateme Credit when it was purch yes, provide closing state than to buy, build, or sub ir home? If yes, provide	urrencies, NFTs, and sta yes, provide details. ovide details. ? vities, or other venture nt. nased? If yes, provide o ement. ostantially improve yo details.	etails.					

### **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 joi	nt			Pro	vide additional statemen	its if mo	ore room is needed
	W-2—Wage and Tax Statement			1	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	fissuer		
	1)				4)			
	2)				5)			
	3)				6)			
Forms	1099-DIV—Dividends and Distributions							
T/S/J	Name of issuer			T/S/J	Name of	fissuer		
	1)				4)			
	2)				5)			
	3)				6)			
Forms	1099-R—Distributions From Pensions, Ann	uities, Ret	irement	or Profit	-Sharing 1	Plans, IRAs, Insurance Co	ontract	s, Etc.
T/S	Name of issuer			T/S	Name of	f issuer		
	1)				4)			
	2)				5)			
	3)				6)			
If the d	istribution is before age 59½, give a reason t	o determin	e if an e	exception	to penalty	v applies.		
Tax-Ex	empt Interest (such as municipal bonds—ir	clude state	ement)					
Payer		\$		Payer				\$
Other I	ncome			-				1
State ta	x refund		\$			Unreported tips	\$	
Unemp	loyment compensation		\$					
	Security (taxpayer) — provide SSA-1099 or R	RB-1099	\$			Other \$		
Social S	Security (spouse)—provide SSA-1099 or RRI	3-1099	\$				\$	
Gambli	ng income—provide Form W-2G		\$				\$	
Busines	ss income (see Sole Proprietorship Tax Organiz	er)				Stock sales	See "	Sales and Exchange
	income (see Rental Property Tax Organizer)					Sale of other property <i>Worksheet"</i> below.		
Sale	s and Exchanges Worksh	eet						
	e information about sales of stock, real estate			1	th E	1000 P 1000 C		the statements

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 f	or dependents—do	7.5% of income to be not include any expe with funds from an F	enses that were	contributions, pro	ovide details of co	r \$500 in noncash cha ntributions. Rules rec 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¢			No	@ 14¢	\$		
		paid for full or partia		<ul> <li>Charitable mileag</li> <li>Casualty and Th</li> </ul>		@ 14¢			
State withhole		siness use of the hom	e. Reported on W-2			ected damage or loss	of property, or		
	d taxes—paid in 20	)24	\$	a theft in a federa	lly-declared disas	ter area, provide deta			
	_	024	\$	preparer. Yes	No				
Real estate tax Real estate tax			\$		Miscellaneous Itemized Deductions. Miscellaneous itemized				
			\$	deductions subject to the 2% AGI limitation are not deductible on the federal return. However, these expenses may be deductible on your sta					
Personal prop	,	2024		return. For use of	home, auto milea	ge, or other job-relate	ed expenses,		
1 ,	efund—received ir	1 2024	\$( )	provide information on a separate sheet. Were any expenses reimbursed by your employer? Yes No					
Foreign tax pa Other	110		\$	Dues	\$	Subscriptions	\$		
			\$	Investment	\$	Supplies	\$		
Other			\$	expenses	Ψ	Supplies	Ψ		
Other	2024 (		\$	Job education	\$	Tax prep fees	\$		
	in 2024 from prior y le interest or penalt		\$	Job seeking	\$	Tools	\$		
	-	x paid during 2024?	Yes No	Legal fees	\$	Uniforms	\$		
Did you purc	hase a car, plane, bo	at, or home in 2024?	Yes No	Licenses	\$	Union dues	\$		
Sales tax paid		1		Safety equipment	\$	Other	\$		
use or rental-	use property, includ	erest paid for full or j ing business use of th ion and ID numbers.		Other Deduction AGI limitation.	<b>ns.</b> The following	deductions are not s	ubject to the 2%		
Main home	\$	Equity loan	\$	Gambling losses	\$	Federal estate tax on IRD	\$		
Second home	\$	Equity loan	\$	Impairment-	\$	Other	\$		
	1				Ψ	Unier	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		\$		\$
Tau Duan anatian Chaptelist	·	·		·

# **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.

TaxpayerSpouseDate	Duine and 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.

# **Rental Property Tax Organizer**

#### **Rental Income and Expenses**

Indicate type of property as 1-Single Family Residence, 2-Multi-Family Residence, 3-Vacation/Short-Term Rental, 4-Commercial, 5-Land, 6-Self-Rental, or 7-Other (describe).

	Prope	erty A	Property B		Property C		
	Address o	f property:	Address o	f property:	Address of property:		
	Туре			Type Any personal use? Yes No		Type Any personal use? Yes No	
	Any personal us						
	Fair Rental Days	Personal Use Days	Fair Rental Days	Personal Use Days	Fair Rental Days	Personal Use Days	
Date placed in service							
Rents received	\$	\$		\$		\$	
Security deposite A socurity	doposit is not included i	in rontal incomo i	f you plan to rotu	rn it to the topont	at the end of the	losso. If any	

**Security deposits.** A security deposit is not included in rental income if you plan to return it to the tenant at the end of the lease. If any amount is forfeited by the renter during the year, include that amount as rental income.

Expenses		
Advertising	\$ \$	\$
Auto and travel	\$ \$	\$
Cleaning and maintenance	\$ \$	\$
Commissions	\$ \$	\$
Insurance	\$ \$	\$
Legal and professional fees	\$ \$	\$
Management fees	\$ \$	\$
Mortgage interest paid to banks	\$ \$	\$
Other interest	\$ \$	\$
Repairs	\$ \$	\$
Supplies	\$ \$	\$
Taxes	\$ \$	\$
Utilities	\$ \$	\$
Other (list)	\$ \$	\$
	\$ \$	\$
	\$ \$	\$

### **Property Information**

If this is your first year with our firm, please provide a depreciation schedule for all property placed in service before 2024.

**Property Purchased.** Treat the cost of improvements made to real property as the purchase of a new asset.

Asset	Date purchased	Cost	Date placed in service
		\$	
		\$	
		\$	
		\$	
		\$	

### Property Sold or Taken Out of Service

Asset	Date sold or taken out of service	Selling price	Trade in?
		\$	
		\$	
		\$	
		\$	
		\$	