

**Spalding Accountancy
7844 Madison Avenue Ste. 120
Fair Oaks, CA 95628**

December 3, 2024

Spalding Accountancy
7844 Madison Avenue Ste. 120
Fair Oaks, CA 95628

Dear :

The 2024 Tax Organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2024 income tax return. Please complete the organizer sections as appropriate and provide supporting documentation where necessary. Prior year data is included in the organizer sections for your reference.

Clients with sole-proprietor businesses and/or rental properties, please populate the appropriate pages in the organizer with income and expenses for the activity. This step is unnecessary if a separate Profit and Loss Statement is provided to us.

Please provide us with photocopies of the following additional information and retain the originals for your records:

- A copy of your 2023 tax return, if not prepared by this office
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Form 1095-A if health insurance was obtained through "Covered California" or other equivalent State Exchange
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond, or other investment transactions (including "gain/loss realized" schedule)
- Closing statements pertaining to real estate transactions (i.e. purchases, sales, refinances)
- Copies of contracts for any new residential solar purchases or new electric vehicle purchases
- Form(s) 1099-K (Merchant Card and Third Party Network Payments)
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities

Thank you for your help in the completion of the Tax Organizer. Please contact us at (916) 974-1572 if you need further assistance.

Sincerely,

Sutton M. Spalding

Sutton's email: sutton.spalding@outlook.com
Sara's email: sara@spaldingaccountancy.com
website: spaldingaccountancy.com

2024

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US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2024, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|----------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Were you married as of December 31, 2024? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year or will it change in the near future? (If "yes", please provide new address) |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2024? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? (If "yes", please provide name, SSN, and date of birth) |
| <input type="checkbox"/> | <input type="checkbox"/> | For the dependents claimed on your return, have you maintained a household for over half of the year and provided over half of their financial support? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2024? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2024, with interest and dividend income in excess of \$1,300, or total investment income in excess of \$2,600? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any expenses for child or dependent care? (If "yes", please provide a copy of the end-of-year statement from the day care or preschool that they attended.) |

HEALTH CARE COVERAGE

- | | | |
|--------------------------|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you obtain health insurance coverage through Covered California or through another State equivalent marketplace exchange? (If so, please provide a copy of Form 1095-A. I cannot complete or file your return without receiving these forms, if applicable) |
|--------------------------|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

INCOME

- | | | |
|--------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents? |
|--------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|

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Miscellaneous Questions

Yes No

Did you receive any disability income?

Did you have any foreign income or pay any foreign taxes?

PURCHASES, SALES AND DEBT

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? (If so, please provide purchase/sale price and date of purchase/sale)

Did you buy or sell any stocks, bonds, or other investment property in 2024?

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? (If "yes", please provide a copy of the settlement statement)

Did you purchase a home in 2024 and you were overseas on official extended duty?

Did you install solar on your primary residence? (If "yes", please provide a copy of the purchase contract showing the total installed cost)

Did you make energy-efficient improvements or purchases to your personal residence involving wind, geothermal or fuel cell energy sources? Or did you purchase/install any new appliances, exterior doors, or exterior windows that qualify for a tax credit? (If "yes", please provide a copy of the purchase contract)

Did you purchase a new electric vehicle during 2024? (If "yes", please provide a copy of the contract for the vehicle purchase that includes the VIN)

If you answered "yes" to the question above, did you elect to have the EV credit transferred to the dealership at the time of purchase?

Did you purchase or install a battery storage device for an electric vehicle during 2024? (If "yes", please provide a copy of the purchase contract)

Did you have any debts cancelled or forgiven? (If "yes", was it done through bankruptcy or were you considered insolvent at the time? Please provide a copy of 1099-C)

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Miscellaneous Questions**RETIREMENT PLAN**

Yes

No

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

If you checked "No" to the question above, would you consider making an traditional IRA contribution by April 15th, 2025 to reduce your 2024 tax liability?

Did you transfer or rollover any amount from one retirement plan to another retirement plan?

Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2024?

Do you operate a business with employees in California? If "yes", are you aware of the retirement plan requirement that went into effect? You can view the compliance deadlines at <https://edd.ca.gov/en/employers/calsavers/> and read more about the specific requirements for California employers.

EDUCATION

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? (If so, please provide a copy of Form 1098-T as well as the cost of any required books and supplies)

ITEMIZED DEDUCTIONS

Did you incur a loss because of damaged or stolen property?

Did you work out of town for part of the year?

Did you use your car on the job (other than to and from work)?

ESTIMATED TAXES

Did you make all of your quarterly estimated tax payments to Federal and/or State that were provided to you the previous year? (Please provide the payment amounts and dates on the Organizer page immediately following the questionnaire section)

2024	1040	US	Miscellaneous Questions
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Yes No

 If you have an overpayment of 2024 taxes, do you want the excess applied to your 2025 estimated tax (instead of being refunded)?

 Do you expect your 2025 taxable income and withholdings to be different from 2024?

MISCELLANEOUS

 Do you want to allocate \$3 to the Presidential Election Campaign Fund?

 Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

 May the IRS discuss your tax return with your preparer?

 Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

 Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?

 Was your home rented out or used for business? (If "yes", please complete the Organizer section entitled "Business Use of Home (Form 8829)" or provide us with the various expenses associated with your home office)

 Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station?

 Did you engage the services of any household employees?

 Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

 Did you or your spouse make any gifts to an individual that total more than \$18,000, or any gifts to a trust?

 Did your bank account information change within the last twelve months? (If so, please provide us with updated bank account information for direct deposit. Please verify that the account information on file is correct on the following page)

 Have you or your spouse received an IP PIN (Identity Protection PIN) from the Internal Revenue Service? (If so, please provide a copy of the letter from the IRS)

2024**1040****US****Miscellaneous Questions**

Yes No

Did you receive, sell, send, exchange or otherwise acquire any financial interest in virtual currency or cryptocurrency?

If you checked "yes" to previous question, did you sell or convert any virtual or cryptocurrency during 2024? (If "yes", please provide 1099 and/or gain/loss schedule from exchange platform (Coinbase, RobinHood Crypto, etc.)

TAX RETURN PREPARATION OPTIONS

Would you like to use E-signature (DocuSign) to authorize your personal tax return? (If "no" is selected, paper copies of the e-file authorization forms will be mailed to you for signature)

Would you prefer to pick up your 2024 tax package from our office when completed? (If "no" is selected, your completed tax package will be mailed to the address we have for you in our system)

Would you prefer to receive an electronic Organizer instead of a paper Organizer in future years? (If "yes", please ensure that the email address we have for you is correct)

Note: If you would like to send documents for tax preparation via a secure link, please give us a call to request an Intuit Link.

Please circle ONE of the following options for how you would like to receive a copy of your 2024 tax return:

- USB Flash Drive
- Encrypted Email Copy
- Paper Copy

If more than one option is selected above, additional charges may apply to cover the shipping expense (unless the second option is an encrypted email copy).

2024 1040 US Tax Organizer

Spalding Accountancy

7844 Madison Avenue Ste. 120

Fair Oaks, CA 95628

Telephone number: 916-974-1572

Fax number: 916-974-0363

E-mail address: sutton.spalding@outlook.com

Tax Return Appointment

Date:

Time:

Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2024 tax return. Please enter all pertinent 2024 information. If you have attached a government form for an item, check the box and do not enter a 2024 amount.

CLIENT INFORMATION

Taxpayer

Spouse

First name and initial.....		
Last name.....		
Title/suffix.....		
Social security number....		
Occupation.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
1=blind.....		
Home phone.....		
Work phone.....		
Work extension.....		
Cell phone.....		
E-mail address.....		
Drivers License #.....		
Drivers License State.....		
Issue Date.....		
Expiration Date.....		

Address

Street address.....

Apartment number.....

City.....

State.....

ZIP code.....

DEPENDENTS

Dependent No.

Dependent No.

First name.....		
Last name.....		
Title/suffix.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
Date of adoption (m/d/y).....		
Social security number....		
Relationship.....		
Months lived at home.....		

WAGES, SALARIES AND TIPS

Employer Name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

2024 Amount

2023 Amount

Attach Forms W-2

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Please enter all pertinent 2024 information. If you have attached a government form for an item, check the box and do not enter a 2024 amount.

INTEREST INCOME

Payer Name:

Form with two input lines for Payer Name.

Table with columns for 2024 Amount and 2023 Amount, and a row for Attach Forms 1099-INT.

DIVIDEND INCOME

Payer Name:

Form with two input lines for Payer Name.

Table with columns for 2024 Amount and 2023 Amount, and a row for Attach Forms 1099-DIV.

PENSION AND IRA INCOME

Payer name:

Form with two input lines for Payer name.

Table with columns for 2024 Amount and 2023 Amount, and a row for Attach Forms 1099-R.

GAMBLING WINNINGS

Payer name:

Form with two input lines for Payer name.

Table with columns for 2024 Amount and 2023 Amount, and a row for Attach Forms W-2G.

Total gambling losses.....
Winnings not reported on Form W-2G.....

Table with columns for 2024 Amount and 2023 Amount for gambling losses.

OTHER GOVERNMENT FORMS - INCOME

- Form 1099-B - Sales of stock (also include transaction history).....
Form 1099-MISC - Miscellaneous income.....
Form 1099-K - Merchant card and third party network payments.....
Form 1099-S - Sales of real estate (also include closing statements).....
Form 1099-G - State tax refunds.....

Table with columns for 2024 Amount and 2023 Amount, and a row for Attach Forms 1099.

Taxpayer:

- Form SSA-1099 - Social security benefits.....
Form 1099-G - Unemployment compensation.....

Table with columns for 2024 Amount and 2023 Amount, and a row for Attach Forms 1099.

Spouse:

- Form SSA-1099 - Social security benefits.....
Form 1099-G - Unemployment compensation.....

Table with columns for 2024 Amount and 2023 Amount, and a row for Attach Forms 1099.

MISCELLANEOUS INCOME

Alimony received.....
Spouse: Alimony received.....

Table with columns for 2024 Amount and 2023 Amount for alimony received.

Other:

Form with two input lines for Other miscellaneous income.

Table with columns for 2024 Amount and 2023 Amount for other miscellaneous income.

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Please enter all pertinent 2024 information. If you have attached a government form for an item, check the box and do not enter a 2024 amount.

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer:

- Traditional IRA contributions (1=maximum).....
- Roth IRA contributions (1=maximum).....
- Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

2024 Amount	2023 Amount

Spouse:

- Traditional IRA contributions (1=maximum).....
- Roth IRA contributions (1=maximum).....
- Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

OTHER GOVERNMENT FORMS - DEDUCTIONS

- Form 1098-E - Student loan interest.....
- Form 1098-T - Tuition and related expenses.....

Attach Forms 1098	

Affordable Care Act

- Form 1095-A - Health Insurance Marketplace Statement.....

Attach Forms 1095	
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ADJUSTMENTS TO INCOME

Taxpayer:

- Self-employed health insurance premiums.....
- Educator expenses.....
- Expenses from rental of personal property.....

Other adjustments to income:

Alimony Paid - Recipient name & SSN

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Spouse:

- Self-employed health insurance premiums.....
- Educator expenses.....
- Expenses from rental of personal property.....

Other adjustments to income:

Alimony Paid - Recipient name & SSN

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MEDICAL AND DENTAL EXPENSES

- Prescription medicines and drugs.....
- Doctors, dentists and nurses.....
- Hospitals and nursing homes.....
- Insurance premiums.....
- Taxpayer: Long-term care premiums.....
- Spouse: Long-term care premiums.....
- Insurance reimbursements.....
- Out-of-pocket lodging and transportation expenses.....
- Number of medical miles.....

Other:

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Please enter all pertinent 2024 information. If you have attached a government form for an item, check the box and do not enter a 2024 amount.

MEDICAL AND DENTAL EXPENSES (Continued)

Other: [line] 2024 Amount 2023 Amount

TAXES PAID

Table with 2 columns: Description, 2024 Amount, 2023 Amount. Rows include State income taxes, City/local income taxes, State and local sales taxes, etc.

Other: [line] [line] [line]

[checkbox] Personal property taxes (including automobile fees in some states)..... Attach Tax Notice

INTEREST PAID

Home mortgage interest and points paid [checkbox] Attach Forms 1098

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee)

Points not reported on Form 1098

Investment interest (interest on margin accounts): Passive Interest.....

CASH CONTRIBUTIONS

Note: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contributions date(s), and contribution amount(s).

[line] [line] [line]

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Please enter all pertinent 2024 information. If you have attached a government form for an item, check the box and do not enter a 2024 amount.

CASH CONTRIBUTIONS (Continued)

Volunteer Expenses (out-of-pocket).....
 Number of charitable miles.....

2024 Amount	2023 Amount

NONCASH CONTRIBUTIONS

Note: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better.
 In addition, a deduction for any item with minimal monetary value may be denied.

MISCELLANEOUS DEDUCTIONS

Union and professional dues.....
 Tax return preparation fee.....
 Safe deposit box rental.....
 Investment expenses.....
 Estate tax, section 691(c).....

Unreimbursed employee expenses:

Other:

