

2025 Individual Taxpayer Organizer

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Steadman Tax Services, LLC
 3000 Joe DiMaggio Blvd Suite 58 Round Rock, TX 78665
 512.535.7332 (Voice) 512.275.6237 (Fax)
www.steadmantax.com

Please complete all sections of the organizers so we can ensure we have current information, even if there is no change.

Taxpayer			SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	<i>Email</i>	
			<i>IP PIN</i>	
Occupation	Date of birth MM/DD/YYYY			Are you new to our firm? Yes No
Address	City			State Zip
County	Home phone			Work or cell
Driver's License No.			<i>State</i>	<i>Issue Date</i>
			<i>Exp. Date</i>	
Spouse			SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	<i>Email</i>	
			<i>IP PIN</i>	
Occupation	Date of birth MM/DD/YYYY			Are you new to our firm? Yes No
Address <i>(If different from Taxpayer)</i>	City			State Zip
County	Home phone			Work or cell
Driver's License No.			<i>State</i>	<i>Issue Date</i>
		<i>Exp. Date</i>		

Do you have an IRS Identity Protection PIN as a result of Identity Theft? Yes or No Do you rent or own your home? Own or Rent

If you moved during 2025, enter your previous address. _____ Date of move ____/____/____

State information: States of residence during 2025 and dates _____ From _____ to _____ MM/DD/YY
 School district _____ State _____ County _____

Marital status at 12/31/2025 Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Usure

Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No

Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.

Were there any births during the year? Yes No If yes, provide birth certificates

Names of dependent children <i>Child's full name</i>	<i>Social Security #</i>	<i>IP PIN</i>	<i>Date of birth MM/DD/YYYY</i>	<i>Months lived in home in 2024</i>	<i>Relationship</i>	<i>College student?</i>

Other dependents or people who lived with you	<i>Social Security #</i>	<i>IP PIN</i>	<i>Date of birth MM/DD/YYYY</i>	<i>Months lived in home in 2024</i>	<i>Relationship</i>	<i>Income</i>

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2025? Yes No

Do any of the children have a disability? Yes No

Did any of the children have any income above \$1,350 for the year? Yes No

Questions - All Taxpayers (Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse - enter "?" If unsure about a question.

LIFESTYLE & HEALTH	Do you want a soft copy uploaded to the portal, a physical return, or both? <input type="checkbox"/> Soft Copy <input type="checkbox"/> Physical Copy <input type="checkbox"/> Both		
	If you want a physical copy, do you want to pick it up or have it mailed? <input type="checkbox"/> Pick up <input type="checkbox"/> mailed (\$15 fee applies)		
	The below option is for limited communication only and does not provide, or allow Steadman Tax Services to represent you as your Power of Attorney with the IRS. If you need IRS representation for IRS issues, this would be covered under a separate engagement.		
	Yes	No	Would you like us to communicate with the IRS for this specific tax return if there are any issues regarding payments or refunds only?
	Yes	No	Are either you or your spouse legally blind?
	Yes	No	Are you currently a member of the military or Retired military? State of residency _____
	Yes	No	Did you pay or receive alimony during the year? Paid / Received \$ _____ Recipient's SSN _____ Provide copy of Divorce Decree
	Yes	No	Did anyone in the household receive unemployment income during the year? If yes, provide 1099-Gs
	Yes	No	Did you purchase health insurance through the Government Marketplace? If Yes, Form 1095-A (REQUIRED)
	Yes	No	Did you contribute to a Health Savings Account (HSA) during the year? (This is separate from a FSA) If yes, provide Form 1099-SA and contribution amounts.
	Yes	No	Did you, or do you plan to contribute additional money to your HSA before 15 April 2026 for 2025?
	Circle	One	Is the HSA account a <input type="checkbox"/> Family plan <input type="checkbox"/> or <input type="checkbox"/> Individual Plan (Circle one) How many months did you participate in the HSA during the year? _____
	Yes	No	Have you paid alternative minimum tax (AMT) in previous years? If yes, please explain type and year(s).
	Yes	No	Do you have federal debt which is overdue, being collected, and is the responsibility of only one spouse?
	Yes	No	Did you pay anyone for domestic services that you hired directly and does not have their own business? (If yes, complete the Household Domestic Worksheet).
	Yes	No	Are you involved in bankruptcy, foreclosure, or repossession?
	Yes	No	Did you have any debt cancelled during the year? (includes credit cards, car loans, etc, provide 1099-C)
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement? Divorce?
	Yes	No	Did you provide any type of Gifts to any person (not a charity) during the year in excess of \$19,000, including cash, assets or partial interest in property? If yes, please provide details. For joint filers, if you gave more than \$19,000 in total to any one person you are required to file a gift return and elect to split the gifts.
Yes	No	Did you make estimated tax payments during the year? If yes, please provide details on page 5.	
FOREIGN	Yes	No	Were you a citizen of OR lived in a foreign country? Foreign Country _____
	Yes	No	Did you have any accounts or assets outside the USA during the year? (Includes online, physical, virtual accounts, Pension, Trust, and Annuities, Real Estate, provide details) Value of account or FMV of assets _____.
	Yes	No	Did you receive a distribution from, or were you the grantor of, or transfer to, a foreign trust?
	Yes	No	Did you receive a gift from a foreign person? If yes, provide details.
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted during the year? If yes, provide birth certificates, social security cards and adoption records.
	Yes	No	Did you pay any college tuition for a child, a dependent, or yourself during the year? If yes, complete the Education Worksheet .(www.steadmantax.com/downloads)
	Yes	No	Did you make any contributions to a 529 plan during the year? If yes, please provide details.
	Yes	No	Did you take any distributions from a 529 plan during the year? Please provide Form 1099-Q.
	Yes	No	Did you pay any student loan interest during the year? If yes, provide Form 1098-E.
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (provide statement from provider with Tax ID, amount and address)
	Yes	No	Do you have any children who had more than \$1,350 of gross investment income for the year?
	Yes	No	Would you like Steadman Tax Services to file Form 4547 for all eligible dependent children? Form 4547 is used to establish a "Trump Account" for any children under age 18. Additionally, children born between 2025 and 2028 will be eligible to receive a free \$1,000 from the US government. (www.trumpaccounts.gov)

Questions - All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse - enter "?" If unsure about a question.

INVESTMENTS	Yes	No	Did you roll over any amounts from a retirement account during the year? If yes, please provide details.		
	Yes	No	Did you sell or transfer any stock or investment property? If yes, please provide details or statements.		
	Yes	No	Did you, or will you, contribute any money to an Individual Retirement Arrangement (IRA) account for the year?		
	This does <u>not</u> include any rollovers or 401Ks. This is for IRAs only. This question refers to direct contributions made by you or spouse throughout the year.				
	Traditional IRA: Taxpayer _____ / Spouse _____ Roth IRA: Taxpayer _____ / Spouse _____				
HOME	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? Provide details		
	Yes	No	Were you granted, or did you exercise, any employee stock options during the year? (provide 1099s and details)		
	Yes	No	Did you engage in any type of gambling during the year? (online sites, casino, sports gambling, etc) Explain		
	Yes	No	Did you own any Virtual Currency (e.g. Bitcoin, Ethereum, Dogecoin, etc) or any have virtual currency transactions during the year? (If YES, Complete the Virtual Currency Worksheet, www.steadmantax.com/downloads)		
OTHER DEDUCTIONS	Yes	No	Do you anticipate Itemizing your deductions? (Mortgage Interest, property taxes, charity..etc) - complete Itemized worksheet at www.steadmantax.com/downloads		
	Yes	No	Have you been issued a mortgage credit certificate (MCC)? (issued by the State; provide a copy of the certificate)		
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.		
	Yes	No	Did you pay sales taxes on a major purchase, such as a vehicle, boat, motorcycle, or RV home? provide receipts		
	Yes	No	Did you make any charitable contributions? Please provide all statements.		
	Yes	No	Did you have any uninsured loss to your property in a <u>Federally Declared Disaster Area</u> ? (provide details)		
	Yes	No	Did you sell a home during the year? If yes, provide closing statement and Form 1099-S if received.		
	Yes	No	Did you purchase a main home during the year? If yes, provide closing statement.		
BUSINESS	Yes	No	Did you refinance a mortgage or take a home equity loan? (provide closing statements)		
	Yes	No	Is either spouse a teacher, instructor, counselor, principal or aid for a K-12 school and work at least 900 hours during the year? Enter amt Taxpayer _____ Spouse _____		
	Yes	No	Did you purchase a new car, truck, or van? Please upload purchase documents "and" loan documents for the year.		
	Yes	No	Did you make any new energy-efficient improvements to your home? (Provide copies of invoice and proof of payment). If purchase was financed, we will need <u>invoice</u> and <u>financing</u> documents, energy star certified and certain items must have the certificate. HVAC, Water Heaters, Furnaces - must be certified energy efficient (please provide copy of <u>manufacturers certificate</u>) Solar, Wind, Geothermal, Biomass Fuel (Stoves designed to heat the house using organic materials)		
	Yes	No	Did you, or your spouse, receive tip income during the year? If yes, provide the last paystub for each job showing the tips		
Yes	No	Did you, or your spouse, receive overtime pay during the year? If yes, provide earnings records showing overtime for each.			
Yes	No	Do you own a business or receive income from a 1099-NEC? (complete a separate organizer for the business) Sole proprietor's - complete Sole Proprietor Organizer - all others require a separate engagement & organizer			
Is the activity engaged as a "for-profit" business or a "hobby". Please circle one			For Profit	Hobby	
** see hobby information at steadmantax.com/downloads for more information **					
BUSINESS	Yes	No	Do you own an LLC? If multiple, how many separate LLCs do you own? _____		
	<input type="checkbox"/> Disregarded entity - files business on personal return (Schedule C/E/F) _____ (name) <input type="checkbox"/> Partnership - files a separate return for the business (Form 1065) _____ (name) <input type="checkbox"/> S-Corporation - files a separate return for the business (Form 1120S) _____ (name)				
	Yes	No	Do you own rental property? If yes, please complete the rental worksheet. (steadmantax.com/downloads)		
	Yes	No	Did you receive income from a sharing/gig economy activity? (e.g Airbnb, Uber, Door Dash - complete Sole Proprietor wkst)		
	Yes	No	Do you own a farm? (complete the Farm worksheet from steadmantax.com/downloads)		
Yes	No	Did you complete the appropriate business worksheet, either Business, Farm, Rental or Sole Proprietorship?			

Dependency Worksheet

(complete if claiming children, parents or other individuals as a dependent, use additional sheets as necessary)

Taxpayer Name: _____ Spouse Name: _____

List complete names of each dependent (child, parent, or other dependent) claimed on your return. Use additional sheets as necessary.

Is each dependent a U.S. Citizen, U.S. National, or U.S. Resident Alien? Yes No Yes No

Relation of each dependent (if adopted, please provide dates)

How many months (or days) did each dependent reside in your home? (see note1)

Total income received by dependent (including Social Security, investment, and other income)

Did you provide more than half the support for the dependent for the entire year? Yes No Yes No

Are you, or spouse, self-employed or receive any income from services or jobs you perform. (includes ride share, delivery, or other income producing activities) Yes No

1. Were all children claimed on this year's return naturally born to both parents listed on this return, and there are no divorced or separated parents situation, or other claims to dependency applies? (mark NA if claiming a parent)	Yes	No	NA
2. Can you provide documents to support your answer if requested by the IRS? (school or medical records showing residency of dependent to match custodial parent)	Yes	No	
3. Have you ever been denied earned income credit or child tax credit in the past? Explain.	Yes	No	
4. Are you filing as Single or Head or Household? (Married filing jointly circle "no")	Yes	No	

If you answered "YES" to 1 and 2, and "NO" to 3 and 4 above, STOP HERE and sign the bottom, otherwise continue.

Is the dependent a qualifying child of another taxpayer? (see note2) Yes No Yes No

If yes, please list who _____

Which parent has the highest adjusted gross income? _____

If child did not live in your home for the entire year, do you have a Form 8332 signed by the custodial parent? Yes No Yes No

If child resides in your home, did you release the custody to another parent for the year to allow them to claim the child? Yes No Yes No

Please provide a copy of school, daycare records, or other equivalent document with child's name and same address. (type of record)

(type of record provided) (type of record provided)

Note 1: Child must live with taxpayer for more than half the year. If child lives with both parents who are separated, then the custodial parent is determined by the number of days (nights) at each parents house. If child lives with parents equally, the IRS will treat the child as the qualifying child of the parent who had the higher adjusted gross income for the year

Note 2: Qualifying child of more than one person: Even if a child meets the conditions to be the qualifying child of more than one person, only one person can claim the child as a qualifying child for all of the following tax benefits, unless the special rule for Children of divorced or separated parents applies:

1. Dependency exemption	4. Credit for child and dependent care expenses
2. Child tax credits	5. Exclusion for dependent care benefits
3. Head of household filing status	6. Earned income credit

Taxpayer's Signature _____ Date _____ Spouse's Signature _____ Date _____

Estimated Tax Payments — Tax Year 2025

(Include payments made for 2025 Taxes, not 2024 balance due or payments on prior years balances)

Please provide the following documentation: **Date paid** **MM/DD/YYYY** **Federal (amount)** **Date paid** **MM/DD/YYYY** **State (amount)**

First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2024 Tax Return overpayment?		\$		\$
Total		\$		\$

Tax Preparation Checklist (Please review and make sure you provided all of your documents,

list of most common forms, not all inclusive)

- Signed Engagement Letter
- Completed Individual Organizer (this form)

- All Forms W-2 (wages) (please make sure to include all W2s especially if you changed jobs and may have a small one from the beginning of the year)
- 1099-G (unemployment)
- 1099-INT (interest)
- 1099-DIV (dividends)
- 1099-R (pensions and IRA distributions)
- SSA-1099 (Social Security Income or Social Security Disability Income)
- 1099-B (proceeds from broker or barter transactions),
- Schedules K-1 from partnerships, S corporations, Estates and Trusts,
- 1099-NEC and 1099-MISC Forms from any jobs whether full time or part-time, even Uber or other Gig Economy sources
- 1095-A (health insurance purchased through the marketplace like healthcare.gov

Additional worksheets if applicable:

- Itemized worksheet (includes state and local taxes, mortgage interest, charity..etc)
- Education worksheet
- Daycare information
- Sole Proprietor worksheet
- Rental worksheet
- Farm worksheet
- Closing statements from sale or purchase of main home, vacation home, rental homes, or investment property.

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

NOTES: