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5 EASY STEPS TO HELP US PREPARE YOU FOR THE APPROACHING TAX SEASON

- 1.** Your account must be current through December 31, 2024 and we must have a completed Organizer on file before we can release your tax package. If this presents a problem, call and we'll do our best to work with you.
- 2.** Hold your Organizer until you have all of the forms you are expecting from banks, employers, contractors, etc., then send everything to us all at one time. **Be sure to make copies of your income statements and send the originals to us.**
- 3.** The LLC Partnership IRS filing deadline is March 15th. We will need everything in our office by no later than March 1st in order to meet this deadline.
- 4.** Please do not place receipts for 2024 and 2025 in the same envelope. Mixing receipts will only delay your tax package.
- 5.** If you have sub-contractors that will need a 1099 from you, supply us with the following information by no later than January 15, 2025: Contractor's name, social security number, address, and amount paid.

If you should have questions about any of the above or the Organizer, please don't hesitate to call.

BTC

2024 Tax Organizer

You must complete and return this Organizer to our office before your tax return can be compiled.

Taxpayer's Name: _____

Spouse's Name: _____

Address for Tax Return: (Number, City, State, Zip)

County of residence: _____

Phone and Driver License Numbers:

Home: _____

Cell: _____

Email: _____

D/L #: _____

(Required on many state tax returns)

Please complete the Tax Organizer in its entirety, and include it with all copies of your W-2's, 1099's, etc. We cannot compile your tax return without a completed Tax Organizer.

We suggest that you either scan or make copies of all your income statements such as (W-2/1099's) then mail us the originals.

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Filing Method: (Only one method may be selected.)

Single [] Married Filing Jointly [] Married Filing Separate [] Head Of Household []

Age of Taxpayer on December 31st: _____

Age of Spouse on December 31st: _____

Taxpayer

Spouse

Social Security Number: _____

Occupation: _____

Date Of Birth: (Required on many State returns.) _____

Children and other Dependents: (If you need more room, please use back.)

1

2

3

4

Full Name: _____

Date of Birth: _____

Social Security Number: _____

Relationship: _____

Contributions to individual retirement accounts:

Taxpayer's IRA: \$ _____

Spouse's IRA: \$ _____

Taxpayer's SEP: \$ _____

Spouse's SEP: \$ _____

Please answer the following questions :

- Are you incorporated? Yes [] No []
- Where there any births, deaths, adoptions, marriages, or divorces in your
immediate family during the year? Yes [] No []
- Did you sell or purchase any real estate during the year? If yes, please include
the closing statement and form 1099S. Yes [] No []
- Did you sell any stocks, bonds, or other property during the year? If yes,
include Form 1099B statement from your broker. Yes [] No []
- Did you pay for the care of one or more persons to enable you to work
during the year? (Daycare.) If "yes", please call BTC for details. Yes [] No []
- Are you a military veteran? Yes [] No []

Did you make any federal or State estimated tax payments for 2024? (Please note which is Federal and which is State.)

Federal or State	Amount	Federal or State	Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

NOTE:

Your fee payment is for bookkeeping services. Since we are providing the tax package free of charge, the "Paid Preparer" section of your return is not signed. This is of no consequence as we stand behind your tax return 100%.