2025

Stafford Tax & Business Advisors, LLC
Trusted • Experienced • Reliable

2025

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PERSONAL INCOME TAX ORGANIZER - TAX YEAR 2025

Please fill out this organizer as completely as possible as it is designed to help you find all of the deductions you are entitled to on your tax return.

GENERAL INFORMATION

Name _____ Social Security #_____
Address _____
City, State, Zip _____ County or City _____
Date of Birth _____ Occupation _____
Phone Numbers Home _____ Cell _____
Email _____ Can we text you with questions? _____

Spouse's Name_____ Social Security # _____
Address (if different)_____
City, State, Zip _____
Date of Birth _____ Occupation _____
Phone Numbers Home _____ Cell _____
Email _____ Can we text you with questions? _____

FILING STATUS as of 12/31/25 (check one)

__Single __Married Filing Jointly __Surviving Widow(er) with dependent child
__Unmarried Head of Household __Married Filing Separately (If MFS) List Spouse's Name & SSN
Name_____ SSN_____

DEPENDENTS (for tax purposes)

***Children* & Other Dependents** (all children must have a SSN; please indicate gender for each child)

Name & Relationship	Social Security #	Date of Birth	Live With You? Yes or No

FORM 1095-A: HEALTH INSURANCE MARKETPLACE

If you or your family received advance payments of the Premium Tax Credit through the Health Insurance Marketplace in 2025, please attach Form 1095-A (Health Insurance Marketplace Statement).
(We must have this form in order to prepare your taxes.)

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INCOME

Number of attached W-2 forms for Taxpayer _____ Spouse _____

*New for 2025 Qualified Tips & Overtime Pay are deductible from income for most taxpayers (your tips should be listed on your W-2) and overtime pay may be deductible from income. If you received overtime pay, please provide your last paystub.

DIGITAL ASSETS / VIRTUAL CURRENCY

During 2025, did you receive, sell, exchange, gift or dispose of any digital assets? Yes No

(This is now a question on the income tax return and must be answered)

INTEREST RECEIVED (Attach 1099 Forms)

Taxpayer (T) or Spouse (S) or Joint (J)	Payer	Amount

DIVIDENDS RECEIVED (Attach 1099 Forms)

Taxpayer (T) or Spouse (S) or Joint (J)	Payer	Amount

SALE OF STOCKS OR OTHER PROPERTY (Attach 1099 Forms)

Taxpayer (T) or Spouse (S) or Joint (J)	Description	*Date Purchased	*Cost	Date Sold	Sale Price

*We need this information for each stock you sold. This should be on your brokerage statement.

**** There is a new Form 1099-DA (Digital Asset Proceeds from Broker Transactions) for 2025 that we will also need in order to file your taxes.**

RENTAL INCOME AND EXPENSES *

Rents Received _____ Property Address _____

Expenses Real Estate Taxes _____ Mortgage Interest _____ Utilities _____
Supplies _____ Repairs _____ Insurance _____
Auto Mileage _____ Other (describe) _____
Improvements (describe) _____

Include your closing statement (HUD 1) if you purchased, sold or re-financed the property during 2025.

*Please attach additional sheets for other rental properties.

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SOCIAL SECURITY AND PENSIONS

Please attach forms SSA 1099 for Social Security and forms 1099 R for pension or retirement benefits.

STANDARD DEDUCTION AMOUNTS FOR 2025

(You can automatically deduct these amounts if you cannot itemize)

Married Filing Jointly	$31,500	Married Filing Separately	$15,750
Head of Household	$23,625	Single	$15,750

DEDUCTIONS AND CREDIT ITEMS

ESTIMATED TAXES PAID FOR TAX YEAR 2025 (not balance due from 2024)

		Federal	State
Overpayment Applied from 2024 Return		_____	_____
	Date Paid	Amount Paid	Amount Paid
1st Qtr.	_____	_____	_____
2nd Qtr.	_____	_____	_____
3rd Qtr.	_____	_____	_____
4th Qtr.	_____	_____	_____

IRA OR SEP CONTRIBUTIONS

Taxpayer Amount _____ Date _____ Type _____
Spouse Amount _____ Date _____ Type _____

MEDICAL EXPENSES (Amounts for which you were not reimbursed; if you can itemize)

Insurance premiums _____ Prescriptions _____ Eyeglasses _____
Doctors _____ Dentists _____ Hospitals _____ Other _____
Medical mileage _____ Long Term Care Premiums _____

TAXES PAID (*New for 2025, you can deduct up to $40,000 of state & local taxes)

Real Estate taxes _____ Personal Property taxes _____
State tax paid for last year's return _____ Other taxes paid _____

INTEREST EXPENSES (if you can itemize)

Home mortgage – interest paid to Financial Institutions _____ Points paid _____
Home mortgage – interest paid to Individual _____ Recipient's SSN _____

*** New for 2025; New Vehicle Loan Interest Deduction (even if you can't itemize)

Interest paid for new vehicles purchased in 2025 _____
VIN _____(required for tax return)

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CONTRIBUTIONS (Only deductible if you can itemize)

Cash and check (for which you have receipts) _____
Description of donated property for which you have receipts _____
_____
Donated to what organization? _____ Address _____
Original Cost of Donated Property _____
Charitable Activity Mileage _____
Other _____

EDUCATION, TUITION (AOTC & LIFETIME LEARNING) & STUDENT LOAN INTEREST

Expenses for qualified higher education (tuition & enrollment fees) _____(attach Form 1098-T)
Student's name _____
What year of Higher Education? (please circle) 1 2 3 4 5+
Student loan interest paid during 2025 _____(attach 1098-E Statement)

CHILD CARE EXPENSES

Name of provider	Address	Fed. ID#	Amount Paid

OTHER

We recommend electronic filing for all returns. You can both receive a refund or pay a balance due with your bank account information. Please provide bank account info below:

_____ _____
Routing Number Account Number

MISC. INFO

Any additional income for 2025? If yes, please list amount and description:
_____
_____

Do you need a paper copy of your return? (please circle) Yes or No Emailed Copy? Yes or No

Questions or notes for preparer?
_____
_____

*****Please remember to enclose W-2s, 1099's, mortgage interest statements, etc.*****

Please do NOT text pictures of tax documents to us; they are very difficult to read.

Thank you for your business. We look forward to working with you.

You do not need an appointment to drop off your taxes.

Please visit our website at www.StaffordTaxAdvisors.com

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