SMITH GOING & ASSOCIATES, LLC

2025 Tax Organizer
Personal and Dependent Information

Yes	No	
☐	☐	Would you like to receive our monthly newsletter?

Personal Information

	Name	IP PIN	SSN	Date of Birth	Healthcare Coverage ALL Year
Taxpayer					
Spouse					

Street Address		
City	State	Zip Code

	Occupation	Daytime Phone	Evening Phone	Cell Phone
Taxpayer				
Spouse				

Taxpayer Email	
Spouse Email	

Marital Status at year end				
☐ Married	☐ Married Filing Separately	☐ Single	☐ Widow(er) If spouse died in 2025, enter the date of death	

	Taxpayer	Spouse
Are you blind?	☐ Yes ☐ No	☐ Yes ☐ No
Are you disabled?	☐ Yes ☐ No	☐ Yes ☐ No
Are you a full-time student?	☐ Yes ☐ No	☐ Yes ☐ No
Do you want $3 to go to the Presidential Election Campaign Fund?	☐ Yes ☐ No	☐ Yes ☐ No

Dependent Information

First, Middle and Last Name	SSN	IP PIN	Relationship	Months In Home	Date of Birth	Disabled	Full-time Student	Healthcare Coverage All Year

Estimates

We cannot assume that all estimated taxes were paid as originally scheduled or on time. Therefore, please enter the amounts and dates of payment or provide proof of payments. Incorrect amounts will result in IRS or state correspondence after the return is filed.

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2024						
First Quarter						
Second Quarter						
Third Quarter						
Fourth Quarter						
Additional Payments						

Account Information for Deposits or Withdrawals

The IRS and certain states allow refunds to be deposited directly to your financial institution account, regardless of the means used to file the return. For balance due returns to be filed electronically, the IRS and many states allow the entire amount due to be paid using electronic withdrawal. If you would like to have your refund deposited into your account or pay a balance due by using an electronic withdrawal, please complete the following fields and **ATTACH A VOIDED CHECK**.

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use this account for	
			Checking	Savings	Deposits	Withdrawals

Personal Information

Yes	No	
☐	☐	Did your marital status change during the year?
If "Yes," explain:		
☐	☐	Can you or your spouse be claimed as a dependent by someone else?
☐	☐	Did your address change during the year?
Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)		

Dependent Information

☐	☐	Did you have any changes in dependents during the year?
If "Yes," explain		
For children born in 2025, they may be eligible to receive pilot program $1,000 contribution to a Trump Account. If eligible, as an authorized individual, would you like to elect to open an account and also elect to receive this payment? This election can be made for an eligible child with the 2025 tax return or online at trumpaccounts.gov. Authorized individuals can establish a Trump Account for children under age 18 at the end of the year with the 2025 tax return or online at trumpaccounts.gov. Would you like to elect to open an account for eligible individuals? If so, we need the dependent's middle name. You can enter that above where you listed the dependent information.		
Authorized individuals can establish a Trump Account for children under age 18 at the end of the year with the 2025 tax return or online at trumpaccounts.gov.		
☐	☐	Would you like to elect to open an account for eligible individuals?
☐	☐	Can another person qualify to claim any of your dependents?
☐	☐	Did you have any childcare expenses during the year?
☐	☐	Did you have any adoption expenses during the year?
☐	☐	Did you have any children under age 19 or a full-time student under age 24 with more than $1,350 or more ($450 if self-employed) of unearned income?
Provide documentation for proof of dependent related credits (school records, medical records, daycare records, etc.)		

Health Care Information

☐	☐	Did any member of your household **NOT** have healthcare coverage for the entire year?
Provide copies of all Forms 1095-A, 1095-B, 1095-C for **ALL** members of your household. If any member of your household received an exemption from the marketplace, provide the Exemption Certificate Number (ECN).		
☐	☐	Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?
☐	☐	Did you make any non-employer HSA Contributions?

Income, Purchases, Sales, and Debt Information

☐	☐	Did you receive any tip income this year? If so, please provide documentation for tip income received during the year. Were any tips not reported to your employer?
☐	☐	Did you receive any overtime pay this year? If so, provide documentation for overtime received during the year.
☐	☐	Did you cash any U.S. savings bonds during the year?
☐	☐	Did you receive any other income not provided with this organizer?
If "Yes," explain		
☐	☐	Did you start a new business or purchase any rental property during the year?
☐	☐	Did you sell an existing business, rental property, or other property during the year?
☐	☐	Did you purchase any business assets or convert any assets to business use?
If "Yes," provide the cost of the asset, the date it was placed in service, and business use percentage.		
☐	☐	Did you purchase any gasoline, diesel, or special fuels for non-highway business use?
☐	☐	Did you buy or sell any stocks, bonds, or other investments during the year?
☐	☐	Did you have a principal residence or a piece of real property foreclosed on during the year?
☐	☐	Did you abandon a principal residence or a piece of real property during the year?
☐	☐	Did you refinance your principal home or second home or take out a home equity loan during the year?
If "Yes," provide all escrow, closing and other pertinent documentation.		
☐	☐	Did you receive any principal or interest during this year from property sold in prior years?
☐	☐	Did you rent out your home or use it for business?
☐	☐	Did you sell, exchange, or purchase any real estate during the year?
If "Yes", provide closing documentation for the purchase and sale of real estate (and 1099-S, if received)		
☐	☐	Did you acquire a new or additional interest in a partnership or S corporation?
☐	☐	Did you have any debts canceled or forgiven this year?
☐	☐	Does anyone owe you money that has become uncollectible?
☐	☐	Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?
If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service.		
☐	☐	Did you receive or pay Alimony? If you paid Alimony, please provide the following:

Name of ex spouse: ____ Date divorce finalized: __________________________

Total alimony paid: _________________________________ Ex-spouse social security number: _____________________________

Itemized Deduction Information

☐	☐	Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
☐	☐	Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
☐	☐	Did you receive any state or local income tax refunds from prior years?
☐	☐	Did you make any major purchases (vehicle, boat, etc.) during the year?
☐	☐	Did you pay any real estate property taxes or personal taxes during the year?
☐	☐	Did you pay mortgage interest during the year?
☐	☐	Did you make cash donations to charity during the year?
☐	☐	Did you make non-cash donations to charity (clothes, furniture, etc.) during the year?
☐	☐	Did you donate a boat or vehicle during the year?
If "Yes," attach Form 1098-C.		
☐	☐	Did you have gambling winnings or losses during the year?

Retirement Information

☐	☐	Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year?
☐	☐	Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
☐	☐	Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
☐	☐	Did you receive any Social Security benefits during the year?
☐	☐	Did you convert IRA funds or any other qualified retirement plan funds into a Roth IRA? If yes, provide details (Form 1099-R).
☐	☐	If over age 70 1/2, did you or your spouse make a contribution from your IRA directly to a charitable organization?
☐	☐	Did you make any catch-up contributions to retirement accounts?

Education Information

☐	☐	Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
☐	☐	Did anyone in your household attend a post-secondary school during the year?
☐	☐	Did you receive a distribution from an Education Savings Account or Qualified Tuition Program during the year (e.g. 529 and ABLE plans)?
☐	☐	Did you make a contribution to an Education Savings Account or Qualified Tuition Program during the year (e.g. 529 and ABLE plans)?
☐	☐	Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?

Miscellaneous Information

☐	☐	Did you incur a gain or loss due to damaged or stolen property?
If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements.		
☐	☐	Did you pay wages > $2,800 to any household employees (babysitter, nanny, housekeeper, etc.)?
☐	☐	Did you make gifts to any one person in excess of $19,000 during the year?
If "Yes," are you splitting the gift with your spouse?		
☐	☐	Did you incur moving expenses during the year? Note: Beginning in 2018, the moving expense deduction is only available to certain military personnel.
☐	☐	Did you make any energy-efficient improvements to your main home during the year?
☐	☐	Are you a business owner who paid health insurance premiums for your employees during the year?
☐	☐	Did you apply an overpayment of your 2024 taxes to your 2025 estimated taxes?
☐	☐	If you have an overpayment of 2025 taxes, do you want the refund applied to your 2026 estimated taxes?
☐	☐	Do you want to have any refund directly deposited?

☐	☐	For payments due, the IRS recommends paying electronically whenever possible. See IRS.gov/Payments for information on making a payment. Do you want any balance due directly withdrawn from your bank account on the due date(s)?
☐	☐	Do you want next year's estimated taxes withdrawn from this same bank account on the due date(s)?
If "Yes," provide a canceled checking or savings slip.		
☐	☐	Did you receive any notices from the IRS or state taxing authority?
If "Yes," explain and provide a copy of the notice.		
☐	☐	May the IRS discuss your tax return with your preparer?
☐	☐	Do you want a printed copy of your tax return in addition to the copy uploaded to your secure portal?
☐	☐	Did you receive (as a reward, award or compensation) or sell, exchange, or otherwise dispose of a digital asset or a financial interest in a digital asset? If yes, provide details, including Forms 1099-DA and cost basis information. Digital assets are any digital representations of value that are recorded on a cryptographically secured distributed ledger or any similar technology. For example, digital assets include non-fungible tokens (NFTs) and virtual currencies, such as cryptocurrencies and stablecoins.
☐	☐	Did you receive any cash transactions of more than $10K?

Foreign Account Information

☐	☐	Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
☐	☐	Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
☐	☐	Did you have any income from, or pay taxes to, a foreign country?
☐	☐	Did you own property in a foreign country?
☐	☐	Did the aggregate value of your foreign accounts exceed $10,000 at any time during the year?

Pre-Visit Checklist

☐	Driver's license(s)
☐	Social Security Card(s)
☐	Dependents' Social Security cards and Dates of Birth
☐	Brokerage statements showing investment transactions for stocks, bonds, etc. - Form 1099-B
☐	Pension or Retirement Income - Form 1099-R
☐	Last year's Federal and State Tax Returns (if you have a copy)
☐	Self-Employed Business/Farm Income and Expenses - 1099-NEC
☐	Child Care Expenses & Provider Information
☐	Interest or Dividend Income - Form 1099-INT/Form 1099-DIV
☐	State Income Tax Refund Amount - Form 1099-G
☐	Brokerage statements showing investment transactions for stocks, bonds, etc. - Form 1099-B
☐	Unemployment Income - Form 1099-G
☐	Social Security Income - SSA-1099

☐	Lottery or Gambling Winnings - Form W-2G
☐	Lottery or Gambling Losses
☐	Alimony paid or received
☐	Rental Income and Expenses
☐	Mortgage or Home Equity Loan Interest Paid - Form 1098
☐	Real Estate Taxes Paid
☐	Personal Property Taxes paid (e.g. cars and boats)
☐	Medical, Eye Care and Dental Expenses
☐	Charitable Contributions – Cash and Non-Cash. We do not need documentation of your charitable contributions, but you must provide a list of charities in your submission. If you have made a contribution of $250 or more and do not have documentation from the charity, it is not deductible
☐	Sale of Residence
☐	Unreimbursed Employment-Related Expenses
☐	Job-Related Educational Expenses
☐	Educator Expenses - Did you incur expenses as an elementary or secondary educator? If so, how much? The amount deductible is limited to $300 per taxpayer.
☐	Tuition and Education Fees - Form 1098-T
☐	Student Loan Interest - Form 1098-E
☐	Adoption Expenses
☐	Casualty or Theft Losses
☐	Foreign Taxes Paid
☐	Estimated Taxes
☐	State and Local Taxes Paid
☐	Moving Expenses
☐	IRA Contributions - Form 5498
☐	Income and Expenses from Partnerships, S Corporations, Trusts, and Estates - Schedule K1
☐	Commissions Received/Paid
☐	All Forms 1095-A, 1095-B and/or 1095-C related to health care coverage or the Premium Tax Credit. It is very important that we receive any form 1095.
☐	529 (1099Q) and Contribution statement
☐	1099-SA (HSA Distributions)
☐	1099-DA (Digital Assets)