2025 1040 US Tax Organizer

Feldmann & Company CPAs PC

523 N Main St Carroll IA 51401

Telephone number: 712-792-2464 Fax number: 712-792-2476

E-mail address:

Tax Return Appointment

Date: Time: Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2025 tax return. Please enter all pertinent 2025 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

CLIENT INFORMA	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		
	In care of	
	Street address	
0.11	Apartment number.	
Address	City	
	State	
	ZIP code	
DEDENDENTS	<u> </u>	
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		
	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		

	1040	US	Tax	Organiz	er		
W۸	a (GES, SALA	governmer	nt form	all pertiner for an item,	nt 2025 informat , check the box	tion. If you have attached and do not enter a 2025	i amount.
	loyer name:	KIES AND	IIF3			2025 Amount	2024 Amount
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INT	EREST INC	OME					
	er name:						
Ш						Attach Forms 1099-INT	
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	NSIONS, IRA	A AND GAN	MBLING	i INCOME		Attach Forms 1099-R & W-2G	
		A AND GAN	MBLING	i INCOME			
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	er name: Winnings not	reported on W	V-2G				
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Paye	Winnings not Total gamblin	reported on W g losses	V-2G	- INCOME			
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MISC	ELLANEOU	IS INCOME			
	Taxpayer: Al	imony received	1		
	Spouse: Alim	nony received			
Other:	•	_			
				1	
RET	IREMENT F	PLAN CON	TRIBUTIONS	2025 Amount	2024 Amount
Тахра	yer: Tradition	al IRA contrib	outions (1=maximum)		
	Roth IRA	contributions	s (1=maximum)		
			E, & qualified plan contributions (1=maximum)		
Spous			outions (1=maximum)		
-			s (1=maximum)		
			E, & qualified plan contributions (1=maximum)		
	Con ompro	, ou, ou, , onin Li	-, a quamitou pian contributions (1 maximum)		
ОТН	FR GOVER	NMFNT F	ORMS - DEDUCTIONS	I	
			interest		
\longrightarrow			lated expenses	Attach Forms 1098	
)	ruition and re	lateu experises		
٨ΕΕ	ORDABLE (ADE ACT			
			ce Marketplace Statement	Attach Forms 1095	
	MIII 1095-A - H	ealtii Ilisurant	ce Marketplace Statement	Attach Forms 1033	
VD II	USTMENTS	S TO INCO	ME		
			····		
Taxpa		acalth incurar	nce premiums		
	, ,		·		
Ot	ther adjustme	nts to income	:		
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			0.0001		
AI	limony paid - I	Recipient nan	ne & SSN		
_					
Spous					
			nce premiums		
	•				
Ot	ther adjustmei	nts to income	:		
_					
Al	limony paid - I	Recipient nan	ne & SSN		
_					
	1041 441	DENES:	TYPENOE		
			EXPENSES	1	
			5		
Hospit	tals and nursi	ng homes			
Insura	ance premiums	S			
Long-t	term care prei	miums - taxpa	ayer		
Long-t	term care prei	miums - spou	se		
Insura	ance reimburse	ement			
Out-of	f-pocket lodgir	ng and transp	ortation expenses		
	-				
				I	
TAX	ES PAID				
		- 1/25 navmo	ent on 2024 state estimate		
	tunos	III PUNITIO			

25	1040	US	Tax Organizer		
TAX	ES PAID (c	ontinued)		2025 Amount	2024 Amount
State	income taxes -	paid with 202	4 state extension		
State	income taxes -	paid with 202	4 state return		
State	income taxes -	paid for prior	years and/or to other states		
City/Io	cal income tax	es - 1/25 payr	ment on 2024 city/local estimate		
City/Id	ocal income ta	xes - paid wit	th 2024 city/local extension		
City/Ic	ocal income ta	xes - paid wit	th 2024 city/local return		
State	and local sale	s taxes (exce	ept autos and special items)		
Use ta	axes paid on 2	025 purchase	es		
Use ta	axes paid on 2	024 state ret	urn		
Sales	tax on autos r	not included a	above		
Sales	taxes paid on	boats, aircra	ft, and other special items		
Real 6	estate taxes - ¡	principal resid	dence		
Real	estate taxes - ¡	property held	for investment		
Foreig	gn income taxe	es			
	ersonal proper EREST PAIL		uding automobile fees in some states)	Attach Tax Notice	
Home	mortgage inte	erest and poir	nts paid:		
<u> </u>				Attach Forms 1098	
Home n	nortgage interest r	ot on Form 1098	(include name, SSN, & address of payee):		
Points	s not reported	on Form 109	8:		
_					
Invest	tment interest	(interest on r	nargin accounts):		
	ve interest				
	: No deduction	n is allowed for	or cash or check contributions unless the do the name of the organization, contribution do		
Volun	teer expenses	(out-of-pock	et)		
	ICASH CON				
		TRIBUTIO		ems that are not in good used con	dition or better, in addition,
		TRIBUTIO	DNS	ems that are not in good used con	dition or better, in addition,
NOTE	: No deduction a deduction	NTRIBUTION is allowed for any item v	DNS or contributions of clothing and household ite with minimal monetary value may be denied.	ems that are not in good used con	dition or better, in addition,
NOTE MISC	: No deduction a deduction	NTRIBUTION IS Allowed for any item N	ONS or contributions of clothing and household ite with minimal monetary value may be denied. CTIONS	ems that are not in good used con	dition or better, in addition,
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