

<h1 style="margin: 0;">Form 1040</h1> <h2 style="margin: 0;">2024 Tax Organizer</h2> <p style="margin: 0;">With Schedules <u>A</u> (itemize), <u>B</u> (interest-Dividends) & <u>D</u> (Capital Gains)</p>

Name _____
 Tel # _____ (Cell) DOB ____ / ____ / ____
 Spouse _____
 Tel # _____ (Cell) DOB ____ / ____ / ____
 Address _____
 E-mail(s) _____

Dependents

First & last name	Social-security	Date of Birth	Relationship
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Income (1 copy needed of below forms – mailed, scanned or faxed is ok but form must be legible)
W-2 1099-R 1099-MISC 1099-G 1099-INT 1099-SSA 1099-DIV
Schedule K-1 for S-Corporation (1120S) and/or Partnership (1065)

Alimony **Received** _____, Likely reported with your SSN by payer

Adjusted Gross Income

Educator Expenses _____, this deduction is for teachers only
 IRA Reg Roth _____ IRA (spouse) Reg Roth _____
 SEP, SIMPLE IRA _____
 Student Loan Interest _____ Tuition & Fees _____
 Education Expenses _____, indicate for whom _____
 Alimony **Paid** _____, Recipient's SSN _____
 Health Savings Act. _____, (from Form 8889) (above recipient's name)
 Health Insurance Paid _____, (self-employed only)

In 2024 anyone who has health insurance on the health care marketplace will receive a 1095-A. Please make sure to include this form with your tax documents. This too will delay your tax refund if we don't receive this from you. You can find a copy in your account at www.healthcare.gov or www.coverme.gov if you live in Maine.

Interest (1 copy needed of each interest and dividend statement received from bank, etc.)

[Do not overlook interest paid to you by U.S. Treasury on overdue tax refunds]

Interest \$ _____ FSJ Bank _____
 Interest \$ _____ FSJ Bank _____

