

**Arena & Harrison CPA's, Inc.**  
**Client Tax Organizer**

**Please provide all tax documents and statements (W-2's, 1099's, K-1's, etc.)**

**1. Personal Information**

Name	Soc. Sec. #	Date of Birth	Occupation	Cellphone #
Taxpayer				
Spouse				
Street Address	City		State	Zip
Email Address				

	Driver License Number	Date Issued	Date Expires	State of Issuance
Taxpayer				
Spouse				

**2. Dependents (Children & Others)**

Name	Date of Birth	Soc. Sec. #	Months Lived With You	Disabled (Y/N)	Full Time Student (Y/N)

**3. Estimated Taxes Paid**

Please list amounts paid by date to each taxing agency

Date Paid	Federal \$	State \$	City \$	School District \$

**4. If you are getting a tax refund, would you like direct deposit to your bank account:**

**YES                      NO**

**If yes, please provide a cancelled check or the following information**

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**Bank Name:**

\_\_\_\_\_

**Routing Number:**

\_\_\_\_\_

**Account Number:**

\_\_\_\_\_

**5. Please answer the following questions as they relate to 2024:**

**YES                      NO**

1. Were there any births, deaths or marital changes in your immediate family?		
2. Do you provide a home or help support anyone not listed above?		
3. Did any of your dependent children have unearned income > \$2,600?		
4. Did you give a gift of more than \$18,000 to any individual during the year?		
5. Did you receive any correspondence for the IRS, State or Municipality?		

**5. Please answer the following questions as they relate to 2024:**

**YES**

**NO**

	<b>YES</b>	<b>NO</b>
6. Are you self-employed or do you receive hobby income?		
7. Did you receive income from raising animals or crops?		
8. Did you receive rent from real estate or other property?		
9. Did you receive income from timber, minerals, oil, gas, copyrights, patents?		
10. Do you have a foreign bank account, trust or business?		
11. Did you have any debts cancelled, forgiven or refinanced?		
12. Did you go through bankruptcy proceedings?		
13. Did you pay student loan interest for yourself, spouse or dependents?		
14. Did you pay any tuition beyond high school for yourself, spouse or dependents?		
15. Did you pay or receive any alimony?		
16. Did you contribute to or receive distributions from a Health Savings Account (HSA)?		
17. If self-employed did you or do you plan to contribute to a retirement plan?		
18. Did you or do you intend to contribute to an IRA?		
19. Did you incur a casualty/theft loss?		
20. Did you incur any child care expenses?		
21. Did you have any medical expenses?		
22. Did you pay real estate taxes on your residence or vacation home?		
23. Did you pay mortgage interest on your residence or vacation home?		
24. Did you make any charitable contributions (cash and non-cash)?		
25. Did you buy or sell your principal residence?		
26. Did you install any energy efficient property in your principal residence?		

**If you answered yes to any of the questions above please provide all relevant information.**

**7. Please list below any questions, comments or other information**

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date