

Taxpayer Information		Spouse Information	
Last name .....	.....	Last name.....	.....
First name .....	.....	First name .....	.....
Middle Initial.....	Suffix.....	Middle Initial.....	Suffix.....
Social security number .....	.....	Social security number .....	.....
Occupation .....	.....	Occupation.....	.....
Work phone .....	Ext ...	Work phone .....	Ext ...
Cell phone .....	.....	Cell phone .....	.....
E-mail address.....	.....	E-mail address.....	.....
Date of birth.....	.....	Date of birth .....	.....
Address .....	.....	Apartment number.....	.....
City .....	.....	State.....	ZIP Code.....
Home phone.....	Fax number .....	.....	.....

#### Dependent Information

First name Last name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....

#### Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....

#### Education Tuition and Fees

Attach all Form 1098-Ts and a list of your qualified education expenses.

#### Student Loan Interest Paid

Enter total 2024 qualified student loan interest.....

**Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation**

Employer Name	2023 Amount
_____	_____
_____	_____
_____	_____

**Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc**

1099-R Payer Name	2023 Amount
_____	_____
_____	_____
_____	_____

**Attach Form(s) SSA-1099 – Social Security/Railroad Benefits**

Taxpayer

Spouse

Social Security Benefits from Form SSA-1099 .....	_____	_____
Railroad Retirement Benefits from Form RRB-1099 .....	_____	_____
Medicare B premiums withheld .....	_____	_____
Medicare C premiums withheld .....	_____	_____
Medicare D premiums withheld .....	_____	_____

**Attach Form(s) 1099-MISC – Miscellaneous Income, 1099-NEC, and 1099-K**

1099-MISC, 1099-NEC, and 1099-K Payer Name

_____
_____
_____
_____

**Attach Form(s) 1099-INT – Interest Income**

1099-INT Payer Name	2023 Amount
_____	_____
_____	_____
_____	_____
_____	_____

**Attach Form(s) 1099-DIV – Dividend Income**

1099-DIV Payer Name	2023 Amount
_____	_____
_____	_____
_____	_____
_____	_____

**Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc**

Attach all stock sale transaction information, including initial cost information.

**Other Government Forms to attach:**

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

**Other Income:**

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

	Taxpayer	Spouse
<b>Retirement Plan Contributions</b>		
Traditional IRA contributions made for 2024 .....	_____	_____
Roth IRA contributions made for 2024 .....	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions .....	_____	_____

Medical and Dental Expenses	2024 Amount	2023 Amount
Prescription medications .....	_____	_____
Health insurance premiums .....	_____	_____
Doctors, dentists, etc .....	_____	_____
Hospitals, clinics, etc .....	_____	_____
Eyeglasses and contact lenses .....	_____	_____
Miles driven for medical purposes.....	_____	_____
Other medical and dental expenses:		
_____	_____	_____

  

Taxes	2024 Amount	2023 Amount
Real estate taxes paid on principal residence .....	_____	_____
Real estate taxes paid on additional homes or land .....	_____	_____
Auto license registration fees based on the value of the vehicle .....	_____	_____
Other personal property taxes .....	_____	_____

  

Interest Expenses	2024 Amount	2023 Amount
Home mortgage interest paid — Attach Form(s) 1098.		
<b>Lender's Name</b>		
_____	_____	_____
_____	_____	_____
Points paid on loan to buy, build or improve main home		
<b>Lender's Name</b>	2024 Amount	
_____	_____	
_____	_____	

  

Cash/Check/Credit Contributions	2024 Amount	2023 Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____

  

Noncash Charitable Contributions
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

  

Miscellaneous Deductions	2024 Amount	2023 Amount
Union and professional dues .....	_____	_____
Professional subscriptions, books, supplies .....	_____	_____
Uniforms and protective clothing (including cleaning) .....	_____	_____
Job search costs .....	_____	_____
Taxpayer educator expenses.....	_____	_____
Spouse educator expenses.....	_____	_____
Tax return preparation fees .....	_____	_____
Safe deposit box rental .....	_____	_____
Gambling losses (to the extent of gambling income) .....	_____	_____
Other expenses (list):		
_____	_____	_____

	Yes	No
1 Did a lender cancel any of your debt in 2024? (Attach any Forms 1099-A or 1099-C).....	<input type="checkbox"/>	<input type="checkbox"/>
2 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? If <b>yes</b> , please attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you purchase a motor vehicle or boat during 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , attach documentation showing sales tax paid.		
4 Did you purchase a hybrid or electric vehicle in 2024? If <b>yes</b> , enter year, make, model, and date purchased: .....	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you donate a vehicle in 2024? If <b>yes</b> , attach Form 1098C .....	<input type="checkbox"/>	<input type="checkbox"/>
6 What was the sales tax rate in your locality in 2024? ..... % State ID .....		
7 Did your marital status change during 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , explain: .....		
8 Were you or your spouse permanently and totally disabled in 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you have dependents who must file? .....	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,600?...	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you provide over half the support for any other person during 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
12 Did you incur adoption expenses during 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? .....	<input type="checkbox"/>	<input type="checkbox"/>
14 Did you receive any disability payments in 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you receive tip income <b>not</b> reported to your employer? .....	<input type="checkbox"/>	<input type="checkbox"/>
16 a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2024? If <b>yes</b> , attach closing or escrow statements, 1099-C or 1099-A forms.....	<input type="checkbox"/>	<input type="checkbox"/>
b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?.....	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you incur any casualty or theft losses during 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
18 Did you incur any non-business bad debts? .....	<input type="checkbox"/>	<input type="checkbox"/>
19 Did you pay any individual for domestic services in 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you take a retirement account distribution related to a natural disaster? .....	<input type="checkbox"/>	<input type="checkbox"/>
21 Did you buy or sell any stocks or bonds in 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
22 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
23 Did you incur any moving expenses? If <b>yes</b> , attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
24 Did you receive any income not included in this Tax Organizer? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please attach information.		
25 Do you expect your income and deductions in 2025 to be the same as 2024? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>no</b> , attach explanation of changes expected.		
26 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach .....	<input type="checkbox"/>	<input type="checkbox"/>
27 At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?.....	<input type="checkbox"/>	<input type="checkbox"/>
28 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____		
29 Enter your state of residence..... Taxpayer _____ Spouse _____		
30 a Do you want to change the language with which the IRS communicates with you? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, which language?.....		

**Electronic Filing and Direct Deposit of Refund**

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically? .....	<input type="checkbox"/>	<input type="checkbox"/>
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.		
If you receive a refund, would you like direct deposit? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , please provide a voided check (not a deposit slip) if your bank account information has changed.		
What type of account is this? .....	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>

**Estimated Tax Paid**

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

**Additional Information** (Enter any additional information here and attach any documents.)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**2024 - ADDITIONAL  
TAX ORGANIZER INFORMATION**

Name(s) \_\_\_\_\_

**Please print clearly**

1. Did you or your spouse pay rent in Massachusetts in 2024? Yes \_\_\_\_ No \_\_\_\_

If yes, what was total rent paid in 2024: \$ \_\_\_\_\_.

2. Did you or your spouse pay for commuter rail tickets or EZ Pass tolls in 2024 for commuting to work in Massachusetts? Yes \_\_\_\_ No \_\_\_\_

If yes, how much did you pay: Commuter rail: \$ \_\_\_\_\_ EZ Pass \$ \_\_\_\_\_

How much did your spouse pay: Commuter rail: \$ \_\_\_\_\_ EZ Pass \$ \_\_\_\_\_

3. Did you have health insurance coverage during 2024 while living in Massachusetts?

You: Yes \_\_\_\_ No \_\_\_\_ If yes, \_\_\_\_ full year or \_\_\_\_ partial year?

Your Spouse: Yes \_\_\_\_ No \_\_\_\_ If yes, \_\_\_\_ full year or \_\_\_\_ partial year?

If yes, did you/your spouse receive MA Form 1099HC or other proof of minimum credible coverage?  
If yes, provide copy of Form 1099HC.

Are you covered by Medicare? Yes \_\_\_\_ No \_\_\_\_

Is your spouse covered by Medicare? Yes \_\_\_\_ No \_\_\_\_

4. In 2024, did you or your spouse receive unemployment compensation? Yes \_\_\_\_ No \_\_\_\_

If yes, how much did you receive: \$ \_\_\_\_\_; provide a copy of Form 1099-G

How much did your spouse receive: \$ \_\_\_\_\_; provide a copy of Form 1099-G

Initial: \_\_\_\_\_

Initial: \_\_\_\_\_