Peters Tax Prep & Consulting PC 2025 Tax Organizer

1657 W Broad St. #5 | Richmond, VA 23220

800-799-4526 | davidpeterstax.com

Failure to complete this organizer in its entirety could result in delays. Please fill out all 2025 information on the tax organizer pages provided. **Please be sure to send secure documents to our portal for security.**

Who is the primary contact? ☐ Taxpayer ☐ Spouse
How do you prefer to be contacted? ☐ Phone ☐ Email

TAXPAYER INFORMATION

☐ Check box if all contact info is same as prior year:

Legal name:
Goes by:
Date of birth:
Occupation:
Are you a veteran? ☐ Yes ☐ No
Email:
Phone #:

SPOUSE INFORMATION

☐ Check box if all contact info is same as prior year:

Legal name:
Goes by:
Date of birth:
Occupation:
Are you a veteran? ☐ Yes ☐ No
Email:
Phone #:

Address: City: State: Zip:
Mailing address (if different): City: State: Zip:
Marital status (check one): ☐ Married ☐ Single ☐ Separated ☐ Widow(er)

Will file jointly? ☐ Yes ☐ No
Did you get married in a state that legally recognizes registered domestic partnerships? ☐ Yes ☐ No
Can you be claimed as a dependent by another taxpayer? ☐ Yes ☐ No
Did any of the taxpayers become legally blind or disabled during the year? ☐ Yes ☐ No
If yes, please explain:

TAX REFUNDS/PAYMENTS

If you are getting a tax refund, how would you like your money?
- ☐ Direct deposit into my bank account
- ☐ Credit to 2026 estimated payments

If you want direct deposit or payment of your taxes from your bank account, please provide:
Financial institution name:
Routing number:
Account number:
Account type: ☐ Checking ☐ Savings
Account owner: ☐ Joint ☐ Taxpayer ☐ Spouse

To help avoid errors, we strongly suggest you provide us a copy of a voided check.
You will have a chance to review your return first.
If you owe tax, do you want the funds electronically withdrawn from your bank account? ☐ Yes ☐ No
If yes, on April 15th ☐
Or Different Date ☐

*Please note electronic withdrawals must be scheduled no later than April 15th; filing an extension does not extend the time to pay. If an extension is filed, any amount paid may be an estimated payment. Any additional amount is due at time of filing. If estimated payment is due with extension, please reach out for a calculation.

DEPENDENT INFORMATION

Name (First, Last)	Relationship	Date of birth	Months lived with you	Disabled	Full time student	Dependent's earned gross income

If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? .... ☐ Yes ☐ No

Do you have any children under age 19 or a full-time student under age 24 with **non-W2** income more than **$2,700** (interest, dividends, capital gains)? .... ☐ Yes ☐ No

Did you adopt or were you in the process of adopting a child in 2025? .... ☐ Yes ☐ No

Did you provide over half the support for any other person(s) other than your dependent children during the year? .... ☐ Yes ☐ No

Did you pay for child care while you worked, looked for work, or while a full-time student? .... ☐ Yes ☐ No

If yes, answer child care provider information below. *Camps qualify*

Child care provider	Dependent name	Street address	City	State	Zip	Employer Tax ID # (required)	Amount paid

PURCHASE, SALES AND DEBT INFORMATION
Answer all questions and attach any requested documents.

Did you start a new business during the year? .... ☐ Yes ☐ No

Did you sell, exchange or purchase any real estate during the year? .... ☐ Yes ☐ No

Did you purchase a rental property during the year? .... ☐ Yes ☐ No

Property address:

- ☐ Attach closing statement/HUD-sale of property
- ☐ Attach closing statement/HUD-purchase of property
- ☐ Attach list of additions/improvements while you owned the property

Attach proceeds from real estate transactions if applicable (Form 1099-S)

Was this your primary residence? .... ☐ Yes ☐ No

NEW CLIENTS ONLY Do you own an interest in a Partnership or S Corporation? .... ☐ Yes ☐ No

- ☐ Attach 2025 K-1 Schedules
- ☐ Attach 2024 K-1 Schedules (including basis schedule)

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PURCHASE, SALES AND DEBT INFORMATION (CONT'D)

Did you foreclose or abandon a principal residence or real property during the year? .... ☐ Yes ☐ No

Did you take out or do you already have a home equity loan? .... ☐ Yes ☐ No

Did you use the proceeds for home improvements? .... ☐ Yes ☐ No

Did you refinance a principal residence or second home this year? .... ☐ Yes ☐ No

- ☐ Attach closing statement/HUD

Did you sell an existing business, rental or other property this year? .... ☐ Yes ☐ No

Please explain:

Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan? ☐ Yes ☐ No

- ☐ Attach cancellation of debt (Form 1099-C) or acquisition or abandonment of Secured Property (Form 1099-A)

Did you sell or exchange any digital assets? .... ☐ Yes ☐ No

INCOME INFORMATION: PLEASE ANSWER ALL QUESTIONS AND ATTACH ANY APPLICABLE DOCUMENTS.

- ☐ Wages: Form W-2 (we suggest you provide the last paycheck stub as well)
- ☐ Overtime: we suggest you provide the last paycheck stub to confirm qualified overtime
- ☐ Tip income
- ☐ Interest income: Form 1099-INT
- ☐ Dividend and distributions: Form 1099-DIV
- ☐ Stock sale information/Capital gains: Form 1099-B (Brokerage statements)
  - ☐ I **authorize** Peters Tax Prep to obtain my 1099-B from Peters Financial on my behalf
- ☐ State/local tax refunds: Form 1099-G
- ☐ Jury duty income : Form 1099 MISC/1099-G (Over $600)
- ☐ Bartering income: Form 1099-B
- ☐ Non employee Compensation: Form 1099-NEC
- ☐ Other Income: Form 1099-MISC

Did you receive any income from property sold prior to this year (such as property sold as an installment agreement or owner financed)? .... ☐ Yes ☐ No

Did you receive any unemployment benefits during the year? .... ☐ Yes ☐ No

- ☐ Attach certain government payments (Form 1099-G)

Did you receive any disability income during the year? .... ☐ Yes ☐ No

Did you receive tip income not reported to your employer this year? .... ☐ Yes ☐ No

Did any of your life insurance policies mature, or did you surrender any policies? .... ☐ Yes ☐ No

Did you receive any awards, prizes, hobby income, gambling or lottery winnings? .... ☐ Yes ☐ No

- ☐ Attach gambling income (Form W-2G)
- ☐ Attach total of gambling losses

Did you receive any self-employment income to report on your personal tax return? .... ☐ Yes ☐ No

- ☐ Attach form 1099-NEC (non employee compensation), 1099-MISC and/or 1099-K and income items not included on the form.
- ☐ Attach business expenses: Provided via bookkeeping software or excel spreadsheet is acceptable
- ☐ Did you sell, exchange or purchase any assets used in your trade or business? .... ☐ Yes ☐ No

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INCOME INFORMATION (CONT'D)

Did you earn income from a rental property? .... ☐ Yes ☐ No

☐ Attach rental income: Miscellaneous information (form 1099-MISC) and income items not included on the form.

☐ Attach rental expenses: Provide a list of rental expenses on an excel sheet.
If you require assistance please contact carly@davidpeterstax.com

FOREIGN INCOME: PLEASE BE AWARE THERE ARE VERY STRICT FOREIGN FILING REQUIREMENTS THAT COULD REQUIRE ADDITIONAL FILINGS

☐ No to all foreign activity

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer? .... ☐ Yes ☐ No

Did you receive a distribution from, or were you a grantor or transferor for a foreign trust? .... ☐ Yes ☐ No

Did you have a financial interest or signature authority over a financial account such as a bank account, securities account or brokerage account, located in a foreign country? .... ☐ Yes ☐No

Please explain:

Do you have foreign financial accounts, foreign financial assets or hold interest in a foreign entity? Examples of foreign assets are: foreign stocks or securities, foreign partnership investments, foreign-issued life insurance or foreign pensions .... ☐ Yes ☐ No

RETIREMENT INFORMATION

What retirement accounts do you have (ex. SEP, 401k, Roth IRA etc.) outside of your employer's sponsored plan?

Are you interested in making any additional retirement contributions for 2025 if possible? .... ☐ Yes ☐ No

Did you make any withdrawals from an IRA, Roth, Keogh, Simple, SEP, 401(k) or other qualified retirement plan?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

☐ Attach distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc. (Form 1099-R). If yes, were any withdrawals due to a federally declared disaster? .... ☐ Yes ☐No

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No ☐ Attach IRA contribution form (Form 5498)

Amount $: Amount $:

Did you receive Social Security benefits?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

☐ Attach Social Security benefit statement (Form SSA-1099)
Find the form here: https://www.ssa.gov/myaccount/replacement-ssa-1099.html

Did you receive Railroad Retirement?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No ☐ Attach Railroad benefits (Form RRB-1099)

Have you received notification of Required Minimum Distributions?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No Amount $:

Did you receive any Medicaid waiver payments as difficulty of care during the year?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

Did you inherit any retirement accounts?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

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EDUCATION INFORMATION

Did you, your spouse or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year? ☐ Yes ☐ No

☐ Attach tuition statement (Form 1098-T)

Did you have educational expenses during the year for yourself, spouse, or a dependent? ☐ Yes ☐ No

Textbooks: $ ______ Parking: $ ______ Supplies: $ ______ Computer & Software: $ ______ Other: $ ______

Did anyone in your family receive a scholarship of any kind during the year? ☐ Yes ☐ No

☐ Attach tuition statement (Form 1098-T) Amount: $ ______

Did you pay any student loan interest this year? ☐ Yes ☐ No

☐ Attach student loan interest statement (Form 1098-E)

Did you cash any Series EE or I U.S. Savings bonds issued after 1989? ☐ Yes ☐ No

☐ Attach interest income (Form 1099-INT) Did you make any withdrawals from an education savings or 529 plan account? ☐ Yes ☐ No

☐ Attach payments from qualified education programs (Form 1099-Q)

Did you make any contributions to an education savings or 529 plan account? ☐ Yes ☐ No

Amount: $ ______

Did you have teacher/educator classroom expenses? ☐ Yes ☐ No

Amount: $ ______

HEALTH CARE INFORMATION

Did you have qualifying health care coverage for 2025 for you or your family? Your family for health care coverage refers to you, your spouse if filing jointly and anyone you claim as a dependent ☐ Yes ☐ No

☐ Attach form 1095

Did you enroll in Marketplace Coverage through healthcare.gov under the Affordable Care Act or share a policy with anyone who is not included in your family? ☐ Yes ☐ No

☐ Attach the health insurance marketplace statement (Form 1095-A)

Find the form here: https://www.healthcare.gov/tax-form-1095/

Did you make any contributions to a health savings account (HSA) Archer MSA or Medicare Advantage MSA this year? ☐ Yes ☐ No

☐ Attach contributions from HSA, Archer MSA or Medicare Advantage MSA (Form 5498-SA)

Did you make any distributions from a health savings account (HSA) Archer MSA or Medicare Advantage MSA this year? ☐ Yes ☐ No

☐ Attach distributions from HSA, Archer MSA or Medicare Advantage MSA (Form 1099-SA)

Did you pay long-term care premiums for yourself or your family? ☐ Yes ☐ No

Amount: $ ______

If you are a business owner, did you pay health insurance premiums for you and your family? ☐ Yes ☐ No

Amount: $ ______

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ITEMIZED DEDUCTIONS

MEDICAL EXPENSES

Medical, dental and vision insurance premiums (paid by you after tax) .... $

Prescription drugs .... $

Out of pocket medical expenses not reimbursed by insurance (co-pays, hospital/clinic, glasses, hearing aids, etc. .... $

Miles driven for medical purposes ....

CHARITABLE CONTRIBUTIONS

Total donations made by cash, check or credit card .... $

☐ Attach a list and provide receipts for all donations

Miles driven for volunteer work ....

Total amount of non-cash donations .... $

For non-cash donations, you must provide a spreadsheet and all donation receipts.

For a copy of an approved spreadsheet, please email carly@davidpeterstax.com

Did you donate a vehicle or boat during the year? .... ☐ Yes ☐ No

☐ If yes, attach the contribution of motor vehicles, boats and airplanes (form 1098-C) or other written acknowledgment from the donee organization.

Did you donate stock during the year? (attach statement)........ ☐ Yes ☐ No

TAXES PAID

Did you have state taxes paid for prior years (such as balances owed on an installment amt)? .... ☐ Yes ☐ No

Did you make any out-of-state purchases (by telephone, internet, mail or in person) for which the seller did not collect state sales tax or use tax? .... ☐ Yes ☐ No

Real estate taxes (provide bills) .... $

Personal property tax (provide bills) .... $

If you need assistance locating your personal property tax websites please email carly@davidpeterstax.com

Did you make any major purchases during the year (car, boat etc)? .... ☐ Yes ☐ No

INTEREST PAID

Did you pay Mortgage interest? .... ☐ Yes ☐ No

☐ Attach Mortgage interest form 1098

CASUALTY AND THEFT LOSS

Did you incur a casualty or theft loss or any condemnation awards during the year? .... ☐ Yes ☐ No

If yes, did the loss occur in a Federally declared disaster area .... ☐ Yes ☐ No

If yes, describe the property:

Amount of damage: $

Insurance reimbursement: $

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MISCELLANEOUS INFORMATION

Did you make gifts of more than $19,000 to any individual? .... ☐ Yes ☐ No

Did you incur moving costs because of a permanent change of station as a member of the Armed forces on active duty? .... ☐ Yes ☐ No

Did you pay any individual as a household employee during the year? .... ☐ Yes ☐ No

If yes, please provide payroll forms or fill out estimated tax payments in the estimated tax section below.

Explain:

Did you receive correspondence from the State or the Internal Revenue Service? .... ☐ Yes ☐ No

If yes, attach correspondence

Describe:

Did you or a dependent receive an identity protection PIN from the Internal Revenue Service or have you or a dependent been victim of identity theft? .... ☐ Yes ☐ No

☐ Attach IRS letter

Get the IP PIN here: https://www.irs.gov/identity-theft-fraud-scams/get-an-identity-protection-pin

Do you want to designate $3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund .... ☐ Yes ☐ No

Did you pay or receive any alimony? .... ☐ Yes ☐ No

Amount paid: $ Or amount received: $

Date of divorce decree:

Do you have previous years of tax returns that are either unfilled or filed with unpaid balances due? .... ☐ Yes ☐ No

NEW CAR & ENERGY EFFICIENT CREDITS

Did you purchase a new vehicle in 2025? .... ☐ Yes ☐ No

If yes, did you pay interest on a loan for the purchase? .... ☐ Yes ☐ No

☐ Attach bill of sale & statement showing interest paid: VIN Lookup Tool

Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?

Did you make energy efficient improvements to your main home this year?
If yes, provide receipts.......... ☐ Yes ☐ No

ESTIMATED TAX PAYMENTS

Were you required to pay quarterly federal or state taxes?.......... ☐ Yes ☐ No

If yes, please fill out the schedule only if paid.

Due Date	Date Paid	Federal Amount	State Amount

Please provide any check images or receipts of the estimated tax payments made. Do you expect a large fluctuation in income, deductions or withholdings next year? .... ☐ Yes ☐ No

If yes, please explain:

TAX RETURN FILING

You will have the ability to electronically sign your tax returns this year. Electronic signatures require that each taxpayer have an email address. Please confirm the email address you want the tax returns for electronic signature sent to:

Taxpayer email address:

Spouse email address:

If you are choosing to sign your documents electronically, please note we will retain a copy of your original copies for 30 days after signatures are complete. Please let us know how you would like to receive your copies:

- ☐ Please email me a scanned copy of my tax documents and shred the originals.
- ☐ Please mail my tax documents back to me. I understand I will incur a deliver fee of $50.

If we do not have a response from you, we will upload copies of your tax documents to your client portal and shred any original documents after 30 days.