FINANCIAL ACCOUNTING SERVICES INC.

2025 Tax Organizer

Name:

☐ Single ☐ Married ☐ Head of Household ☐ Married Filing Separate

SALARIES AND WAGES (enclose all W-2 forms)

W-2	Gross Income	Federal Withheld	FICA	Medicare	State Withheld	SDI
1						
2						
3						
4						

REFUND

Automatic deposit? ☐ Yes (attach a VOID check) ☐ No

DEPENDENTS

Name _____

Name _____

Name _____

Name _____

ADJUSTMENTS TO INCOME

ALIMONY PAID

Payee _____
Payee's SSN _____
Amount _____

IRA CONTRIBUTIONS, ETC.

SIMPLE Plan Deduction _____
Keogh/SEP Deduction _____
Education IRA Deduction _____
Penalty on Early Withdrawal _____

ESTIMATED TAX PAYMENTS

FEDERAL	Date Paid	Amount
Overpayment-Prior Year		
1st Quarter		
4th Quarter		
STATE	Date Paid	Amount
Overpayment-Prior Year		
1st Quarter		
4th Quarter		

Additional Notes and Information:

_____

_____

_____

OTHER INCOME

INTEREST — *Attach Forms 1099INT*

Payor	Amount

DIVIDENDS — *Attach Forms 1099DIV*

Payor	Amount

STATE TAX REFUND — *Attach Forms 1099G*

Amount Received: _____

☐ Check if you did not itemize in prior year

CAPITAL GAINS — *Attach Forms 1099B and 1099S*

Description	Date Acquired	Date Sold	Sales Price	Cost or Basis

PENSIONS/IRA/ANNUITY INCOME — *Attach Forms 1099R*

Payor	Amount

ALIMONY RECEIVED

Payor _____

Payor's SSN _____ Amount _____

UNEMPLOYMENT BENEFITS RECEIVED — *Attach Forms 1099G*

Taxpayer Amount _____

Spouse Amount _____

SOCIAL SECURITY BENEFITS RECEIVED — *Attach Forms SSA-1099*

Taxpayer Amount _____

Spouse Amount _____

OTHER INCOME (CONTINUED)

INCOME FROM PARTNERSHIPS, ESTATES, LLCS, TRUSTS, AND S CORPORATIONS

Attach Forms K-1 and list any not received yet.

OTHER INCOME

Including jury duty fees, finder's fees, director's fees, prizes, gambling winnings, disability payments, unreported tip income and any other income (whether taxable or non-taxable)

Attach detailed schedule

RENTAL INCOME & EXPENSES

Property	# 1	# 2
INCOME		
Rents Received		
EXPENSES		
Advertising		
Association Dues		
Auto & Travel		
Cleaning/Maintenance		
Insurance		
Labor		
Professional Fees		
Miscellaneous		
Mortgage Interest		
Other Interest		
Repairs & Maintenance		
Supplies		
Taxes		
Telephone		
Utilities		
Improvements		
Other:		

ITEMIZED DEDUCTIONS

MEDICAL & DENTAL EXPENSES
Attach detailed schedule
Insurance Premiums _____
Doctors, Dentists, etc. (Net) _____

TAXES PAID

State & Local Income Tax _____
Real Estate Taxes – Residence _____
Real Estate Taxes – Other Property _____
Auto License: No. of Cars _____
Auto License: Fees Paid _____
Personal Property Taxes _____
Other Taxes _____

INTEREST PAID – *Attach Forms 1098*

Home Mortgage (1st) _____
Home Mortgage (2nd) _____
Home Mortgage (Equity Line) _____
Student Loan Interest _____

CONTRIBUTIONS – *Attach Detailed Schedule*

Contributions by Cash or Check _____
Contributions Other than Cash _____

MISCELLANOUS DEDUCTIONS

Union/Professional Dues _____
Investment Expenses _____
Tax Return Preparation Fees _____
Safe Deposit Box Rental _____
Unreimbursed Employee
Business Expenses* _____
Other: _____

*Attach detailed schedule

INCOME FROM BUSINESS OR PROFESSION

GENERAL INFORMATION

☐ Cash Basis ☐ Accrual Basis
☐ First Year ☐ Taxpayer ☐ Spouse

Principal Business/Profession _____
Business Name _____
Business Address _____
City, State, Zip _____

INCOME
Gross Receipts or Sales _____
Returns and Allowances _____
Other Income _____

COST OF GOODS SOLD – *If Applicable*
Inventory at Beginning of the Year _____
Purchases _____
Cost of Labor _____
Materials & Supplies _____
Other Costs _____
Inventory at End of the Year _____

EXPENSES
Advertising _____
Car & Truck Expenses* _____
Commissions _____
Employee Benefit Programs _____
Insurance (other than health) _____
Health Insurance Premiums for Self* _____
Interest _____
Legal & Professional _____
Office Expense _____
Pension & Profit Sharing Plans _____
Rent – Vehicles, Machinery & Equipment _____
Rent – Business Property _____
Repairs & Maintenance _____
Supplies _____
Taxes – Property _____
Taxes – Other _____
Travel _____
Total Meals & Entertainment* _____
Utilities _____
Wages _____
Other* _____
**Attach detailed schedules*

HOME OFFICE
Did you have a home office during the year?
☐ Yes ☐ No
If yes, attach detailed schedule of expenses including mortgage interest (or rent), real estate taxes, utilities, property insurance, maintenance & cleaning