

Client

,

October 6, 2025

PAUL CLARKE CPA
7115 E. 80th ST.
Tulsa, OK 74133

Client

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Dear :

The 2024 Tax Organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2024 income tax return. Please complete the organizer sections as appropriate and provide supporting documentation where necessary. Prior year data is included on the organizer sections for your reference.

Please provide us with the following additional information:

- A copy of your 2023 tax return, if not prepared by this office
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions
- Form(s) 1099-K (Merchant Card and Third Party Network Payments)
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities

Thank you for your help in the completion of the Tax Organizer. Please contact us if you need further assistance.

Sincerely,

2024	1040	US	Client Information	1
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PAUL CLARKE CPA
7115 E. 80th ST.
Tulsa, OK 74133
Telephone number: 918-697-4302
Fax number:
E-mail address: paul10ta@gmail.com

Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2024 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

Filing Status	Filing status (table)	1
	1=married filing separate and lived with spouse	
	Year spouse died, if qualifying surviving spouse (2022 or 2023) ...	
Taxpayer	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	1=blind	
Spouse	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	1=blind	
Address	In care of	
	Street address	
	Apartment number	
	City	
	State	
	ZIP code	
Foreign Address	Region	
	Postal code	
	Country	

Filing Status

1 = Single
2 = Married filing joint
3 = Married filing separate
4 = Head of household
5 = Qualifying surviving spouse (QSS)

2024	1040	US	Client Information (continued)	1 p2
Please add, change or delete information for 2024.				
CLIENT INFORMATION				
Taxpayer Contact Information	Home phone.....		Daytime Phone 1 = Work 2 = Home 3 = Mobile	
	Work phone.....			
	Work extension.....			
	Daytime phone (table).....	3		
	Mobile phone.....			
	Fax number.....			
	E-mail address.....			
Spouse Contact Information	Home phone.....			
	Work phone.....			
	Work extension.....			
	Daytime phone (table).....			
	Mobile phone.....			
	Fax number.....			
	E-mail address.....			
Taxpayer Authentication	Driver's license no.....			
	Driver's license state.....			
	Issue date (m/d/y).....			
	Expiration date (m/d/y).....			
	Theft protection PIN.....			
Spouse Authentication	Driver's license no.....			
	Driver's license state.....			
	Issue date (m/d/y).....			
	Expiration date (m/d/y).....			
	Theft protection PIN.....			

2024	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2024, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes	No	
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
☐	☐	Could you be claimed as a dependent on another person's tax return for 2024?

DEPENDENTS

☐	☐	Were there any changes in dependents?
☐	☐	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2024?
☐	☐	Did you have any children under age 19 or full-time students under age 24 at the end of 2024, with interest and dividend income in excess of \$1,300, or total investment income in excess of \$2,600?

HEALTH CARE COVERAGE

☐	☐	Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement), if so, please attach.
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INCOME

☐	☐	Did you receive unreported tip income of \$20 or more in any month?
☐	☐	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
☐	☐	Did you receive any disability income?
☐	☐	Did you have any foreign income or pay any foreign taxes?

PURCHASES, SALES AND DEBT

☐	☐	Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
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2024	1040	US	Miscellaneous Questions
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|--------------------------|--------------------------|---|
| ☐ | ☐ | Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? |
| ☐ | ☐ | Did you buy or sell any stocks, bonds or other investment property in 2024? |
| ☐ | ☐ | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? |
| ☐ | ☐ | Did you purchase a home in 2024 and you were overseas on official extended duty? |
| ☐ | ☐ | Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? |
| ☐ | ☐ | Did you have any debts cancelled or forgiven? |
| ☐ | ☐ | Does anyone owe you money which has become uncollectible? |

RETIREMENT PLANS

- | | | |
|--------------------------|--------------------------|---|
| ☐ | ☐ | Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| ☐ | ☐ | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| ☐ | ☐ | Did you transfer or rollover any amount from one retirement plan to another retirement plan? |
| ☐ | ☐ | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2024? |

EDUCATION

- | | | |
|--------------------------|--------------------------|--|
| ☐ | ☐ | Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? |
| ☐ | ☐ | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? |

ITEMIZED DEDUCTIONS

- | | | |
|--------------------------|--------------------------|--|
| ☐ | ☐ | Did you incur a loss because of damaged or stolen property? |
| ☐ | ☐ | Did you work out of town for part of the year? |
| ☐ | ☐ | Did you use your car on the job (other than to and from work)? |

2024	1040	US	Miscellaneous Questions
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ESTIMATED TAXES

- ☐ ☐ Did you apply an overpayment of 2023 taxes to your 2024 estimated tax (instead of being refunded)?
- ☐ ☐ If you have an overpayment of 2024 taxes, do you want the excess applied to your 2025 estimated tax (instead of being refunded)?
- ☐ ☐ Do you expect your 2025 taxable income and withholdings to be different from 2024?

MISCELLANEOUS

- ☐ ☐ Do you want to electronically file your tax return?
- ☐ ☐ Do you want to allocate \$3 to the Presidential Election Campaign Fund?
- ☐ ☐ Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- ☐ ☐ May the IRS discuss your tax return with your preparer?
- ☐ ☐ Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- ☐ ☐ Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?
- ☐ ☐ Was your home rented out or used for business?
- ☐ ☐ Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?
- ☐ ☐ Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station?
- ☐ ☐ Did you engage the services of any household employees?
- ☐ ☐ Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

2024	1040	US	Miscellaneous Questions
☐ ☐ Did you or your spouse make any gifts to an individual that total more than \$18,000, or any gifts to a trust? ☐ ☐ Did your bank account information change within the last twelve months? ☐ ☐ At any time during the tax year, did you: receive or sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?			