

2025 Individual Tax Organizer

Gather the documents below before your appointment or before uploading through the client portal. Check off each item you have. Leave blank anything that does not apply to you.

PERSONAL INFORMATION

Full Legal Name (Taxpayer)

Home Address (if changed)

Date of Birth

Phone Number

Social Security Number (last 4)

Email Address

Filing Status

Bank for Direct Deposit

INCOME DOCUMENTS

- | | |
|---|---|
| <input type="checkbox"/> W-2 from each employer | <input type="checkbox"/> 1099-B (stock / crypto sales) |
| <input type="checkbox"/> 1099-NEC (freelance/contract income) | <input type="checkbox"/> 1099-R (pension / IRA distributions) |
| <input type="checkbox"/> 1099-MISC (rental, prizes, etc.) | <input type="checkbox"/> SSA-1099 (Social Security benefits) |
| <input type="checkbox"/> 1099-G (state tax refund / unemployment) | <input type="checkbox"/> 1099-K (PayPal, Venmo, Zelle) |
| <input type="checkbox"/> 1099-INT (bank interest) | <input type="checkbox"/> Alimony received (pre-2019 decrees only) |
| <input type="checkbox"/> 1099-DIV (dividends) | <input type="checkbox"/> Other income (gambling, jury duty, etc.) |

DEDUCTIONS & ADJUSTMENTS

- | | |
|---|--|
| <input type="checkbox"/> Mortgage interest statement (1098) | <input type="checkbox"/> Educator expenses (teachers only) |
| <input type="checkbox"/> Property tax bills (paid in 2025) | <input type="checkbox"/> HSA contributions (5498-SA) |
| <input type="checkbox"/> Charitable donations (receipts \$250+) | <input type="checkbox"/> IRA contributions made for 2025 |
| <input type="checkbox"/> Medical / dental expenses | <input type="checkbox"/> Self-employed health insurance premiums |
| <input type="checkbox"/> State income tax paid (estimated tax payments) | <input type="checkbox"/> Business expenses (if self-employed) |
| <input type="checkbox"/> Student loan interest (1098-E) | <input type="checkbox"/> Home office info (sq footage) |

HEALTH COVERAGE

- | | |
|---|--|
| <input type="checkbox"/> 1095-A (Marketplace / ACA coverage) | <input type="checkbox"/> Did you have coverage all year? |
| <input type="checkbox"/> 1095-B or 1095-C (employer coverage) | <input type="checkbox"/> Did anyone go uninsured? |

LIFE EVENTS IN 2025 (check if applicable)

- | | |
|--|--|
| <input type="checkbox"/> Got married or divorced | <input type="checkbox"/> Received an inheritance |
| <input type="checkbox"/> Had a baby or adopted | <input type="checkbox"/> Moved to a new state |

Bought or sold a home

Turned 65 or older

Started or closed a business

Received forgiven debt (1099-C)

CRYPTO / DIGITAL ASSETS

Bought or sold cryptocurrency

Transaction report from exchange (e.g. Coinbase)

Used crypto to pay for goods/services

Form 1099-DA received

Received crypto as income / mining

Prior year Form 8949 (for basis carryover)

DEPENDENT INFORMATION (if applicable)

Dependent's name & date of birth

Amount paid for childcare in 2025

Dependent's Social Security Number

Tuition statement (1098-T) for college student

Childcare provider name & EIN/SSN

Did dependent have income?

Questions? rmcvey@badgerfoxtax.com | (920) 213-5979 | badgerfoxtax.com