

Individual Tax Organizer 2025



HEALTH INSURANCE:

Yes No

Was your health insurance purchased through Connect for Health?
(i.e. did you get a health insurance subsidy) **Attach 1095A if Yes.**

CONTRIBUTIONS PAID PERSONALLY (not through your W2):

Indicate the amounts contributed personally, if any, to the following. DO NOT include amounts contributed through an employer on a W2 or deducted through a business.

	Taxpayer	Spouse
HSA Health Savings Account distributions	\$ _____	\$ _____
HSA Contributions	\$ _____	\$ _____
Indicate if you had a family or individual health plan	_____	
Traditional IRA	\$ _____	\$ _____
Roth IRA	\$ _____	\$ _____
SEP for self employed	\$ _____	\$ _____

Yes No

Do you want help calculating any of these potential contributions?
Some can be contributed up retroactively. If so indicate in which type you are interested. _____

ESTIMATED TAX PAYMENTS: Only include amounts paid directly by you, NOT amounts withheld through W2s or other withholding.

Yes No

Did you carry over refunds from 2024 to 2025

Did you make estimated payments for 2025 tax outside of payroll withholding? If so, provide dates and amounts below and receipts if you have them

Federal		State	
Date	Amount	Date	Amount
Date	Amount	Date	Amount
Date	Amount	Date	Amount
Date	Amount	Date	Amount

The typical due date for these would be 4/15/25, 6/15/25, 9/15/25 and 1/15/26

Individual Tax Organizer 2025



OTHER THOUGHTS TO CONSIDER: if yes, provide details on page 5

Yes No

Did you change address, legal name or filing status?

Did you or your spouse get an Identity Protection Pin letter from the IRS?

If you are to get a refund, do you want to apply it to the 2026 tax year?

Did you receive or sell/exchange/dispose of any digital assets in 2025 (i.e. Bitcoin)?

Did you have Overtime pay included in your W2? If so, include final paystub

Did you have Tip pay included on your W2 or 1099 <https://irs.gov/tippedoccupations>

Did you pay student loan interest? If yes _____ amount and _____ lender

Did you pay car loan interest for a personal vehicle purchased in 2025?

Did you pay child care for a dependent under the age of 13? If yes provide details.

Did you or a dependent have college tuition? If yes include 1098T

Did you pull funds from a 529 account? If yes, include 1099Q form

Did you contribute to a 529 College Savings Tuition plan for your residency state?

How much? \$ _____ Are you the owner of the account? (yes/no) _____

Do any dependents have earned income > \$15,750

and/or investment income > \$1350?

If yes, do you want dMCPA to prepare this tax return?

Did you have charitable donations? (If yes, please fill out top section on Page 4)

Did you buy or sell a home? Details _____

Did you purchase an Electric or Hybrid vehicle in 2025?

Did you add Energy Efficient or Clean Energy Improvements to your primary home that qualify for tax credits If so, provide details and the Qualified Manuf. ID #

Do you have foreign bank accounts totaling more than \$10,000 during the year?

If yes, do you want dMCPA to prepare the required FBAR reporting?

Did you inherit money or property? Provide details _____

If you are a K-12 educator, did you have out of pocket expenses? \$ _____

Individual Tax Organizer 2025



CHARITABLE CONTRIBUTIONS: NEW – provide receipts from charity for amounts over \$250

Cash ***

Name of Charity	Dollar Amount Donated

Noncash***

Name and Address of Charity	Description	Thrift Store Value	Date

**Attach list if more than can be listed here

OTHER ITEMIZED DEDUCTIONS

Note in 2025 the standard deduction is \$15,750 Single and \$31,500 Married Filing Joint. Only complete the below if you will be close to or over that threshold.

MEDICAL: Note deductibility is limited by 7.5% of your income:

Prescriptions	Long term care premiums – Taxpayer
Doctors, Dentists	Long term care premiums – Spouse
Hospitals, Clinics	Medical Equipment & Supplies
Eyeglasses, Contacts	# miles driven for medical
Insurance premiums paid by you (not Medicare or employer paid)	

TAXES:

Real estate taxes paid in 2025 for Primary Residence
Real estate taxes paid in 2025 for other homes or land (not rentals)
Car Registration OWN tax (on the receipt of your registration)

MORTGAGE INTEREST: Provide copies of all 1098INT forms

Yes No

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Do you have a Mortgage on your home? – include 1098INT
If you have a HELOC, were the funds used to buy/build?
Is your total amount mortgaged greater than \$750K?

Individual Tax Organizer 2025



A Whole Page for additional notes!

This is where you should include:

The details on any questions you answered “yes” to on page 3

Any questions you have

Clarifications on information provided

Changes this past year or other items not addressed above

Upcoming changes that might impact planning for 2026

This page is OPTIONAL.