



Coresperity LLC

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2025 INDIVIDUAL TAX ORGANIZER

Taxpayer				Tax ID # *			
First Name	M.I.	Last Name	Email	IP PIN			
Occupation	Date of birth			Are you new to our firm?	Yes No		
Address	City			State	Zip		
County	Primary phone			Secondary phone			
Driver's License No.	State		Issue Date	Exp. Date			
Spouse				Tax ID # *			
First Name	M.I.	Last Name	Email	IP PIN			
Occupation	Date of birth			Are you new to our firm?	Yes No		
Address <i>(If different from Taxpayer)</i>	City			State	Zip		
County	Primary phone			Secondary phone			
Driver's License No.	State		Issue Date	Exp. Date			
If you moved during 2025, enter your previous address.				Date of move			
Marital status on 12/31/25: Single Married Separated Surviving Spouse							
Were you divorced or separated during the year? Yes No			Were there any deaths in the family? Yes No				
Filing Status: Single Head of Household		Married Filing Jointly Unsure	Married Filing Separately	Qualifying Surviving Spouse			
Names of dependent children Child's full name		Tax ID # *	IP PIN	Date of birth	Months lived in home in 2025	Relationship to taxpayer	College student?
Did any of the children have unearned income of \$1,350 or more?		Yes	No	Do any of the children have a disability?		Yes	No
Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2025? Yes No							
Other dependents or people who lived with you							
Name	Tax ID # *	IP PIN	Date of birth	Months lived in home in 2025	Relationship	Income	
Bank information: Use for Direct deposit of refund Direct debit of balance due Name of bank							
Checking	Savings	Routing transit number	Account number				

Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.

*A Tax ID # is a Social Security Number (SSN), adoption taxpayer identification number (ATIN), or an individual taxpayer identification number (ITIN).

Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse — ask your preparer if you are unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?			
	Yes	No	Have you received any notice from the IRS or state revenue department within the past year? If yes, provide a copy.			
	Yes	No	Did you pay or receive alimony in 2025? <i>Paid</i> <i>Received</i> \$	Recipient's SSN	Date of divorce or separation	
	Yes	No	Did you purchase health insurance through a public exchange/marketplace? (Provide Form 1095-A.)			
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?			
	Yes	No	Did you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home?			
	Yes	No	Did you purchase an energy-efficient, hybrid, or electric vehicle?			
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?			
	Yes	No	Are you a member of the military?	State of residency		
	Yes	No	Were you a citizen of or did you live in a foreign country?	Foreign country		
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? Maximum value in 2025\$			
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? <i>Designee's name</i>	Phone number	PIN (any five digits)	
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2025? (Provide statement for other expenses.)			
	Yes	No	Were any children attending college? (Provide Form 1098-T and Form 1098-E.)			
			Year in college	Paid by you: Tuition \$	Books \$	Student loan interest \$
				Paid by student: Tuition \$	Books \$	Student loan interest \$
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?			
			Student	Amount paid \$		
			Name and address of school			
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable)			
			Name of provider	EIN or SSN		
			Address	Amount paid \$		
	Yes	No	Did you make any contributions to a 529 plan in 2025? If yes, provide details.			
	INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2025?	Traditional IRA Roth IRA	
Yes		No	Did you roll over any amounts from a retirement account in 2025?			
Yes		No	Did you sell or transfer any stock or sell rental or investment property?			
Yes		No	Did you receive any income from an installment sale?			
Yes		No	Did you have any investments become worthless or were you a victim of investment theft in 2025?			
Yes		No	Were you granted, or did you exercise, any employee stock options during 2025?			
Yes		No	Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (Digital assets include cryptocurrencies, NFTs, and stablecoins)			
DEDUCTIONS	Yes	No	Did you, or do you plan to, contribute money by April 15, 2026 to an HSA for 2025? If yes, provide details.			
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.			
	Yes	No	Did you pay sales taxes on a major purchase in 2025, such as a vehicle, boat, or home?			
	Yes	No	Did you make any charitable contributions in 2025? If yes, provide details.			
BUSINESS	Yes	No	Did you work from a home office or use your car for your business?			
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?			
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?			
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.			
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.			
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.			
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.			

State information Full-year resident Part-year resident Nonresident

States of residence during 2025 and dates

Do you rent or own your home? Rent Own

Total rent paid \$ Includes heat? Yes No

Income Worksheet

Provide your preparer with all sources of income documents. Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, 1099-NEC, 1099-K, and other income reporting statements.

- Form W-2 — *Wage and Tax Statement*
- Form 1099-INT — *Interest Income*
- Form 1099-DIV — *Dividends and Distributions*
- Form 1099-R — *Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, Etc. If the distribution is before age 59½, give a reason to determine if an exception to the penalty applies.*
- Form SSA-1099 — *Social Security Benefit or RRB-1099 — Railroad Retirement Board*
- Form 1099-MISC — *Miscellaneous Income*
- Form 1099-NEC — *Nonemployee Compensation (Independent Contractors, freelancers, etc.)*
- Form 1099-K — *Payment Card and Third-Party Network Transactions*
- *Other income reporting statements*

Tax-Exempt Interest (such as municipal bonds — include statement)

Payer	\$	Payer	\$
Other Income			
State tax refund	\$	Unreported tips	\$
Unemployment compensation - provide 1099-G	\$	Other	\$
Gambling income — provide Form W-2G	\$	Other	\$
Business income (see <i>Sole Proprietorship Tax Organizer</i>)		Stock sales	
Rental income (see <i>Rental Property Tax Organizer</i>)		Sale of other property	See "Sales and Exchanges Worksheet" below.

Sales and Exchanges Worksheet

Provide information about sales of stock, real estate, or other property, along with Forms 1099-B, 1099-S, or other supporting statements.

Description of property	Purchase date	Cost/basis	Sale date	Sale price
		\$		\$
		\$		\$
		\$		\$

Notes:

- When stock is sold, you will usually receive Form 1099-B, *Proceeds From Broker and Barter Exchange Transactions*, reporting the proceeds from the sale. However, your statement will not always provide the cost/basis information necessary to compute gain or loss. If the statement does not contain the cost/basis information, you must provide it. You may need to contact your broker for questions about cost/basis and purchase dates of your stock accounts.
- Often, "transfers" of stock or mutual funds within a brokerage account are actually sales of one type of stock and purchase of another. Even if you did not receive any cash from the transaction, you may have taxable gain or loss.
- If your stock dividends are automatically reinvested, the dividends will be taxable even though you did not receive any cash. The transaction is treated as if you had received cash and purchased additional stock. When the stock is sold, the amount reinvested over the years is taken into account. You may need to contact your broker for questions about the amount of reinvested dividends.
- If you sold property other than stock, your taxable gain or loss will be determined by your cost/basis. The cost/basis is usually the original purchase price plus improvements (the cost of repairs and maintenance are not taken into account for cost/basis).

Itemized Deductions Worksheet

Deductions must exceed \$15,750 Single, \$31,500 MFJ/QSS, \$23,625 HOH, or \$14,750 MFS to be a tax benefit.

Medical Expenses. Must exceed 7.5% of income to be a benefit — include cost for dependents — do not include any expenses that were reimbursed by insurance or paid with funds from an FSA, HSA, or HRA.				Charitable Contributions. If over \$500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all contributions.			
Dentists	\$	Hospitals	\$	Monetary (cash, check, credit card)	\$		
Doctors	\$	Insurance	\$	Noncash contributions (FMV). Clothing or household items must be in good used condition or better.	\$		
Equipment	\$	Prescriptions	\$				
Eyeglasses	\$	Other (specify)	\$	Did you transfer funds from an IRA directly to a charity? Yes No	\$		
Medical miles: _____ @ 21¢				Charitable mileage _____ @ 14¢			
Taxes Paid. Do not include taxes paid for full or partial business or rental-use property, including business use of the home.				Casualty and Theft Losses			
State withholding		Reported on W-2		If you suffered any sudden, unexpected damage or loss of property, or a theft in a federally-declared disaster area, provide details to your tax preparer. Yes No			
State estimated taxes — paid in 2025		\$					
Real estate tax — residence		\$		Miscellaneous Itemized Deductions. Miscellaneous itemized deductions subject to the 2% AGI limitation are not deductible on the federal return. However, these expenses may be deductible on your state return. For use of home, auto mileage, or other job-related expenses, provide information on a separate sheet. Were any expenses reimbursed by your employer? Yes No			
Real estate tax — other		\$		Dues	\$	Subscriptions	\$
Personal property taxes		\$		Investment expenses	\$	Supplies	\$
Property tax refund — received in 2025		\$()		Job education	\$	Tax prep fees	\$
Foreign tax paid		\$		Job seeking	\$	Tools	\$
Other (specify)		\$		Legal fees	\$	Uniforms	\$
Other (specify)		\$		Licenses	\$	Union dues	\$
Other (specify)		\$		Safety equipment	\$	Other	\$
Balance paid in 2025 from prior year state returns (do not include interest or penalties)		\$		Other Deductions. The following deductions are not subject to the 2% AGI limitation.			
Did you keep receipts for sales tax paid during 2025? Yes No				Gambling losses	\$	Federal estate tax on IRD	\$
Did you purchase a car, plane, boat, or home in 2025? Yes No				Impairment-related expenses	\$	Other (specify)	\$
Sales tax paid \$		Purchase paid \$		Date			

Interest Paid. Do not include interest paid for full or partial business-use or rental-use property, including business use of the home.

Provide all Forms 1098 or lender information and ID numbers.

Main home	\$	Equity loan	\$	Gambling losses	\$	Federal estate tax on IRD	\$
Second home	\$	Equity loan	\$	Impairment-related expenses	\$	Other (specify)	\$
Points	\$	Investment interest	\$				

Other Deductions or Questions

Notes:

- Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.
- Work clothing is not deductible if adaptable for every day wear. Exception for safety equipment, such as steel-toe boots.
- Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible.

Adjustments Worksheet

Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum \$300 each.	\$
Health savings account (HSA). Contributions for 2025 may be made through April 15, 2026. (Only include contributions you made out-of-pocket).	\$
Self-employed SEP, SIMPLE, and qualified plans. Contributions for 2025 may be made through April 15, 2026.	\$
Self-employed health insurance. Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.	\$
Penalty on early withdrawal of savings.	\$
IRA deduction. For traditional IRAs. Roth IRAs are not deductible. Contributions for 2025 may be made through April 15, 2026.	\$
Student loan interest. Paid for taxpayers and dependents.	\$
Moving expenses. Available only to members of the Armed Forces (or their spouses or dependents) on active duty that move pursuant to a military order and incident to a permanent change of station. Only unreimbursed expenses are deductible.	\$
Business expenses of reservists, performing artists, and fee-based government officials.	Ask preparer
Other adjustments. Include description.	\$

Estimated Tax Payments — Tax Year 2025

Installment	Date paid	Federal	Date paid	State
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2024 overpayment		\$		\$
Total		\$		\$

Tax Preparation Checklist

Please provide the following documentation:

- All sources of income documents - Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), SSA -1099 (Social Security), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements.
- Form 1095-A (for health insurance purchased through a public exchange/marketplace), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).
- If you are a new client, provide copies of last year's tax returns.
- The completed Individual Income Tax Organizer. *Note:* If you choose not to fill out the organizer, you must at least answer the "Yes" or "No" questions under "Questions — All Taxpayers."
- Copy of the closing statement if you bought, sold, or refinanced real estate.
- Mileage amounts for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage.
- Detail of estimated tax payments made, if any.
- Copy of all supporting documents for applicable deductions and credits (1098, 1098-T, 1098-E, property tax statement, childcare statement, receipts or acknowledgment letters received from charitable organizations, and other supporting documents).
- Income and deductions categorized on a separate sheet for business or rental activities.
- List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a duplicate copy in the future.

Tax Return Preparation

We will prepare your tax return based on the information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance.

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your express written permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date