Howland Tax Services International

2024 Personal Tax Organizer (United States)



Personal Information

You		Your Spouse		
Name (including initial)		Name (including initial)		
SSN or ITIN		SSN or ITIN		
Date of Birth		Date of Birth		
Preferred Filing Status		☐ Head of Household		
☐ Single		☐ Married Filing Separately		
☐ Married Filing Jointly		☐ Qualifying Surviving Spouse		
Address		Address (if different)		
Zip Code		Zip Code		
Phone		Phone		
Email		Email		
Occupation		Occupation		
Filing Category (You):		Filing Category (Your Spouse):		
☐ United States Citizen		☐ United States Citizen		
\square Green Card Holder, or Resident Alien		☐ Green Card Holder or Resident Alien		
☐ Non-Resident Alien		☐ Non-Resident Alien		
☐ Live in Canada, Work in U.S. (Commuter)		☐ Live in Canada, Work in U.S. (Commuter)		
State of residence on Dec. 31, 2	024 (if applicable):			
Bona fide resident of Puerto Rico United States Visa type and date	-	or Northern Mariana Islands?	□ Yes □ No	
•				
Canadian Visa type and date iss	ued (if applicable):			
Non-Resident Aliens: days present in U.S. during		2024: 2023	:2022:	
Your Dependants	1	2	3	
Name				
Date of Birth				
Relationship				
SSN or ITIN				
Income (Type and Amount)				
Months Lived With You				
U.S. Citizen/Resident Alien?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	

General Background

Did your marital status change during the year?	☐ Yes	□ No
If yes, indicate change and date of change:		
Did you live apart from your spouse for the entire year?		□ No
Does your spouse itemize deductions on a separate return?		□ No
Can you be claimed as a dependent on another person's tax return?		□ No
Do you want \$3 to go into the Presidential Election Campaign Fund?		□ No
Were you or your spouse enrolled as a full-time student during 2024?		□ No
Did you pay any educational tuition or fees for yourself or a dependent?		□ No
Were you or your spouse permanently disabled at any time during 2024?		□ No
Were you or your spouse legally blind at any time during 2024?		□ No
Did you pay childcare expenses?		□ No
If yes, provide names, addresses and tax ID numbers (SSN or EIN) of childcare providers, a	nd receipts.	
Did you (or your spouse if filing jointly) receive any advance child tax credit payments?		□ No
Did you engage in a transaction involving a digital asset (i.e. virtual currency) during 2024?		□ No
Do you want to show your email address on your return filed with the IRS?		□ No
Did you purchase health insurance through a government-sponsored Marketplace in 2024?		□ No
Please provide copies of Form 1095-A. 1095-B. or 1095-C if received.		

Documents Needed to Prepare your Return(s)

	New clients: complete copies of the last tax returns filed
	Copies of income tax forms received, including W-2, 1042-S, 1095-A, 1095-B, 1095-C, 1098, 1098-C, 1098-T, 1099-B, 1099-C, 1099-DIV, 1099-G, 1099-INT, 1099-K, 1099-MISC, 1099-OID, 1099-Q, 1099-QA, 1099-R, 1099-SA, RRB-1099-R, SSA-1099, SSA-1042-S, Schedule K-1, etc.
	Clean vehicle credit: did you purchase a new or used plug-in electric motor vehicle during 2024?.
	Indicate income from alimony, gambling winnings, prizes or awards, scholarships or fellowships, jury duty, etc
	Eligible educators: qualified expenses paid (i.e. classroom materials, professional development courses)
	Homeowners: statements showing mortgage interest and qualified mortgage insurance payments (i.e. Form 1098), sale of home or other property (i.e. Form 1099-S), real estate taxes paid
	Receipts for rent paid, if your state return permits a rental tax credit and you qualify
	Receipts for moving expenses, if you are a member of the Armed Forces on active duty, and due to a military order you move because of a permanent change of station
	Documentation of cash gifts, if you gave more than \$18,000 to any one person during the year
	Receipts for student loan interest paid
	Documentation of qualified educational expenses (i.e. Form 1098-T)
	Receipts for auto personal property tax paid
	Charitable donations: provide bank record, cancelled check or receipt for all amounts
	Investment interest expense receipts
	Childcare expense receipts
	Alimony paid or received: provide documentation
	Receipts for medical/dental expenses and reimbursements from health coverage plans
	Casualty/theft losses: provide documentation
	Estimated tax payments made for 2024: provide documentation
	IRS or State correspondence and assessment notices, if received
	Receipts or documentation of retirement plan contributions
	Income and expenses from rental properties or businesses
	Foreign Tax Credit: if you paid tax to a foreign country for income earned outside the United States, provide details and a copy of the foreign tax return
	Please indicate any other income or expense amounts:
_	

Refunds

If you receive a refund on your 2024 income tax return, do you want to apply that refund to your 2025 tax?					
	☐ Yes	□ No			
Do you want your refund to be direct deposited into your bank accounts?	☐ Yes	□ No			
If yes, provide information for up to three accounts (banks must be located in the U.S.):					
Bank Routings:					
Account Numbers:					
Foreign Accounts and Investments					
Did you have more than \$10,000 in foreign (non-U.S.) bank or financial accounts at any	time during 202	.4			
(including Canadian RRSPs, RRIFs, RESPs, or TFSAs)?	☐ Yes	□ No			
If yes, FinCEN Report 114 Report of Foreign Bank and Financial Accounts should be fill BSA E-Filing system. If you would like us to complete and file the form for you, please paddresses of financial institutions, account numbers and types, and maximum values of 2024:	orovide name and	d			
Note that, if you can't make the April 15 deadline above, you are allowed an automatic You don't need to request it to take advantage of this later filing date, but you should enfiling on your FBAR.					
If you had foreign (non-U.S.) financial assets in 2024, you may also be required to file F Specified Foreign Financial Assets or Form 8621 Information Return by a Shareholder Investment Company or Qualified Electing Fund with your income tax return(s).					