III...I

General Information Taxpayer Spouse First Name Middle Initial Last Name Suffix Social Security Number . . . Date of Birth Date of Death Check ("X") which phone number to list on return. Home Phone Work Phone Cell Phone Fax Number Legally Blind Totally Disabled Claimed as a Dependent . . . Presidential Election Fund (\$3) Occupation E-mail address State of Residence as of 12/31 . . County of Residence as of 12/31. School District as of 12/31 . . Sales tax rate of locality in 2024 . If Part Year, Period of Residency . to Additional information is being requested this filing season in an effort to combat stolen-identity tax fraud. Please provide the requested information from the driver's license or state-issued identification card. Providing the information could help process state returns faster. ID type Driver's license OR State Issued ID Driver's license OR ID number ID issuing state _____ ID expiration date . Filing Status Status on 2023 return: Status as of 12/31/2024: Single Enter ("X") in the box 2 Married filing joint 3 Married filing separately (Enter spouse's name and SSN above) Head of Household Non-dependent name: Non-dependent SSN: 5 Qualifying surviving spouse (QSS) Year spouse died Taxpayer's Address Apt/Suite : Street State City Zip Code If address is in a foreign country, enter that country . . . Foreign postal code Foreign province/county . . ____ If a bona fide resident of a U.S. territory, enter territory . . **Preparer's Information** Preparer's name Firm's name Street **Attestation and Signature:** To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records. Sign Date

here

		Name 55N
		Questions
Yes	No	Personal Information Did any births, adoptions, marriages, divorces, or deaths occur in your family since last year? Did you purchase or sell your principal residence or did your address change? Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return? Were you in a Registered Domestic Partnership, civil union or same-sex marriage during 2024? Were either you or your spouse in the military or National Guard? Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax correspondence? Have you or your spouse been an identity theft victim and given an identity theft protection six digit PIN by the IRS?
Yes	No	Dependents Are there any changes in your dependents from last year? Did you have any children under 19 (or 24 if a full time student) who received more than \$1,300 in investment income? Did you pay education expenses for your dependent children? Did anyone in your family receive a scholarship of any kind during 2024? Did you pay any dependent care expenses for a child or a parent? Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent? Are all of your dependents either US residents or citizens?
Yes	No 1	Health Care Coverage Did you or a member of your family have minimum essential coverage in 2024? (The entity that provided the coverage may have sent you a Form 1095-A, 1095-B, or 1095-C, that lists individuals in your family who were enrolled in minimum essential coverage and shows their months of coverage.)
Yes	No	Income (In 2024, did you or your spouse have any of the following?) Wages? (include form(s) W-2) Non-employee compensation? (include form(s) 1099-NEC) Miscellaneous Income? (include form(s) 1099-MISC) Interest income? (include form(s) 1099-INT) Dividend income? (include form(s) 1099-DIV) Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account? Gambling income? (include form(s) W-2G). Be sure to include any gambling expenses. Social security or Railroad Retirement benefits? (include form(s) SSA-1099 & RRB-1099) Did you receive a state or local refund, or a refund of any other deduction you itemized in a prior year? (attach 1099-G) Disability income? (include form(s) W-2 or 1099) Unemployment compensation? (include form(s) 1099-G) Alimony? Did you receive tip income NOT reported to your employer? Did you receive payments from a Long-Term Care insurance contract? Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp? Did you receive employer-provided adoption benefits for a previous year? Did you cash in any U.S. savings bonds? Did you make a loan to someone at an interest rate below market rate? Did you receive a housing allowance for ministerial services you provided? Did you receive any income not reported in this Organizer? Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)? Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?
Yes	No 1 2 3	Foreign Reporting Did you have an interest in or signature authority over a financial account in a foreign country? Were you the grantor of or transferor to a foreign trust? Did you receive income from a foreign source or pay taxes to a foreign government?
Yes	No	Retirement & Other Plans Did you receive any distributions from a retirement plan? (Include form(s) 1099-R) Did you rollover a retirement plan distribution into another plan? Did you convert a traditional IRA to a Roth IRA? Did you make a contribution to a retirement plan? (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account? Did you receive a distribution from an HSA, Archer MSA or Medicare Advantage MSA (Include form(s) 1099-SA) Did you make any contributions to an HSA (Health Savings Account) in 2024? Did you receive a qualified disaster distribution in 2024? Did you receive an early distribution for a qualified birth or adoption distribution?

Yes	No	Purchases, Sales, Gains and Losses
	1	Did you exchange any securities or investments for something other than cash?
	2	Do you have any short sales, commodity sales, or straddles?
	3	Did you receive Form 2439?
	H 4	Did you buy or sell any bonds?
	5	Did you receive stock from a stock bonus plan with your employer?
	6	Did you sell any other personal assets at a gain?
	7	Did you sell any real estate (other than your home) during the year?
	8	Did you sell any assets using the installment method?
	9	Did you receive proceeds from a prior year installment sale?
	10	Did you purchase a rental property?
	11	Did you exchange any property for other property?
	12	Did you incur a loss because of damaged or stolen property?
	13	Did you purchase a new vehicle, aircraft or boat?
	14	Did any security become worthless during 2024?
	15	Did any debts become uncollectible during 2024?
	16	Did you puchase any items acquired out of state, online or by mail order that did not include sales tax?
		Purchase and Partial Property language (C.D. 1. 4)
Yes	No	Business and Rental Property Income & Deductions
		If you own rental property, do you qualify as a Real Estate Professional?
	2	Did you start or acquire a new business?
	3	Did you sell any part of an existing business, or sell business assets?
	⊢ 4	Did you cease operating any business or rental property?
	5	Did you remove any of your business assets for personal use?
	6	Did you use part of your home for business purposes?
	7	Did you make any contributions to a Keogh or a self-employed SEP plan for 2024?
	8	Do you pay for any health or long term care insurance through your business?
	9	If you or your spouse are self-employed, are either of you covered under an employer's health plan?
	10	Did you purchase any furniture or equipment for your business?
	11	Did you make any improvements to your rental properties?
	12	Did you receive income from raising animals or crops?
Yes	No	Other Deductions
	1	Did you use your car on the job (other than to and from work)?
	2	Did you work out of town for part of the year?
	3	
	— ·	Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?
	4	Did you incur any travel and entertainment expenses for business purposes?
		Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work?
Н	4	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024?
	4 5	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024?
	4 5 6	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity?
	4 5 6 7 8 9	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024?
	4 5 6 7 8 9	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station?
	4 5 6 7 8 9 10	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves?
	4 5 6 7 8 9 10 11	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest?
	4 5 6 7 8 9 10 11 12 13	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments?
	4 5 6 7 8 9 10 11 12 13	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you pay alimony?
	4 5 6 7 8 9 10 11 12 13 14 15	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you donate non-cash donations?
	4 5 6 7 8 9 10 11 12 13	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you pay alimony?
	4 5 6 7 8 9 10 11 12 13 14 15	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you donate non-cash donations?
Yes	4 5 6 7 8 9 10 11 12 13 14 15	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you donate non-cash donations?
Yes	4 5 6 7 8 9 10 11 12 13 14 15	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you pay alimony? Did you donate non-cash donations? Did you donate a vehicle?
Yes	4 5 6 7 8 9 10 11 12 13 14 15	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you donate non-cash donations? Did you donate a vehicle? Miscellaneous Did you make gifts of more than \$18,000 to any one person? Did you engage the service of any household employees?
Yes	4 5 6 7 8 9 10 11 12 13 14 15 16 No 1	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you donate non-cash donations? Did you donate a vehicle? Miscellaneous Did you make gifts of more than \$18,000 to any one person? Did you engage the service of any household employees? Did your bank account information change within the last twelve months?
Yes	4 5 6 7 8 9 10 11 12 13 14 15 16 No	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you pay alimony? Did you donate non-cash donations? Did you donate a vehicle? Miscellaneous Did you make gifts of more than \$18,000 to any one person? Did you engage the service of any household employees? Did your bank account information change within the last twelve months? Do you want to allocate \$3 to the Presidential Election Campaign Fund?
Yes	4 5 6 7 8 9 10 11 12 13 14 15 16	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you pay alimony? Did you donate non-cash donations? Did you donate a vehicle? Miscellaneous Did you make gifts of more than \$18,000 to any one person? Did you engage the service of any household employees? Did your bank account information change within the last twelve months? 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?
Yes	4 5 6 7 8 9 10 11 12 13 14 15 16 No 1 2 3 4	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you donate non-cash donations? Did you donate a vehicle? Miscellaneous Did you make gifts of more than \$18,000 to any one person? Did you engage the service of any household employees? Did your bank account information change within the last twelve months? 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? Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2024?
Yes	4 5 6 7 8 9 10 11 12 13 14 15 16	Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? Did you contribute less than an entire interest in any property to charity? Did you refinance a mortgage or take out a home equity loan during 2024? Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves? Did you pay any student loan interest? Did you make any federal or state estimated payments? Did you pay alimony? Did you donate non-cash donations? Did you donate a vehicle? Miscellaneous Did you make gifts of more than \$18,000 to any one person? Did you engage the service of any household employees? Did your bank account information change within the last twelve months? 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?

Yes	No 1 2	Return preparation and filing Do you want to e-file your return? If you are due a refund, how do you want to re	eceive it?			
		Check sent to you in the mail		Other quick re	fund via a bank pr	oduct
		Apply to next year's estimates				
		Direct deposit (please provide voided	l blank check)	Type of account:	Checking	Savings
		If you owe taxes, how do you want to pay the	m?			
		Paper check sent with my return	Credit card	Installment Ag	reement	
		Direct debit (please provide a voided	blank check)	Type of account:	Checking	Savings
	3	Do you want to allow your tax preparer to disc If no, enter another person (if desired) to be a	•			
		Designee's name	Phone Number		Personal identifi Number (5 digit	

Wages

W-2 Information

"X" if		Box 1 Wages, Tips	Box 2 Federal Income	Box 16 State	Box 17 State Income
spouse		Other Comp	Tax Withheld	Wages	Tax Withheld
	1				
	2				
	3				
	4				
	5 6				
+ 1					
1	7				
+	8				
H-1	9			+ +	
1	0				
- 1	11		1		
1	2				
1	3				
1	4		1		
1	5				
1	6				
	7				
1	8				
1	9				
2	20				
	21				
	21				
	22				
	23				
<u> </u>	25			+ +	
²	26				
2					
2	28				
2					
3	30				
	31				
3	32				
	33				
3	34				
	35				
1	36				
	37				
			1	1	
	99			1	
				1	
	10			1	
			+	1	
				+	
4	13				

Retirement Income

1099-R Information

"X" if		Box 1 Gross	Box 4 Federal Income	Box 16 State	Box 14 State Income
spous	e Payer's Name	Distribution	Tax Withheld	Distribution	Tax Withheld
	1				
	2				
	3				
	4				
-	56				
-	7				
-	8				
-	9				
-	10				
	11				
	12				
	13				
	14				
	15				
	16				
	17				
	18				
	19				
	19				
	20				
	21				
-	22				
-	23				
-	24				
-	25				
	26				
	27				
	28				
	29				
	30				
	31				
	32				
	33				
	34				
	35				
	36				
-	37				
	38				
	39				
	40				
<u> </u>	41				
	42				
	43				

Name			SSN			
Interest Income						
Please provide copies of all Form 1099	-INT or other s	tatements re	porting interes	t income.		
* F/S/J - enter ownership (F)iler, (S)pouse,	Taxable Inte	erest Income	Tax Exem	pt Interest	Specified Priv	Act Interest
or (J)oint.	Current Year	Prior Year	Current Year	Prior Year	Current Year	Prior Year
*F/S/J Payer	Amount	Amount	Amount	Amount	Amount	Amount
11						
2						
3						
4						
5						
7						
8						
9						
10						
<u> 11 </u>		1	 			
12						
13						
14						
15						
16						
17						
18						
19						
20						
	DIV or other s	tatements re	norting divider	nd income		
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse,	Ordinary	Dividends	Qualified	Dividends	Capital	
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint.	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer	Ordinary	Dividends	Qualified	Dividends		
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint.	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10 11	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10 11 12 12 13	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10 11 12 12 13 14	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10 11 12 12 13 14 15	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10 11 12 12 13 14	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10 11 12 12 13 14 15	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
* F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10 11 12 12 13 14 15 16	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year
Please provide copies of all Form 1099 * F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint. *F/S/J Payer 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17	Ordinary Current Year	Dividends Prior Year	Qualified Current Year	Dividends Prior Year	Current Year	Prior Year

Name	SSN
Name	3311

Business Assets Placed in Service in Prior Years

		Date Placed		Explain any assets no longer used by the business	
Activity	Description	In Service	Cost	by the business	
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					
31					
32					
33					
34					
35					
36					
37					
38					
39					
40					
41					
42					
43					
44					

	Name				Ş	SSN	
Self	-Employed Business Inco	me and	Expenses (S	Schedule C)			
	Enter "X" in one box:	Filer	Spouse				
G	eneral Information						
	Employer Identification Number			(do not e	enter So	cial Security Numbe	er)
	Principal business or profession						
	Business name						
	Business address						
	City				State	e	Zip
	Foreign Country						
	Foreign Province/State				Post	al Code	
G	eneral Check Boxes (Enter ">	√ where app √	olicable)				
1	Accounting Method	Cash	Accrual	Other - (Spec	ify)		
2	Did you "materially participate" in this	s business?	Yes	No			
3	Check ('X') if you started or acquired	this busine	es in 2024				
3							1
4	Did you make any payments in 2024	that would	require you to file	Form(s) 1099?		Yes	No
В	isiness Income					Current Year	Prior Year
	* Report statutory income as W-2 incomes receipts or sales not reported		199 or Form W-2		-	Amount	Amount
5	Gross receipts or saies not reported	on ronn ro	555 OF 1 OTHE W-2		5		
6					6		
7					7		
8					8		
9					9		
10					10		
11					11		
12					12		
13					13		
14					14		
15	Income reported on 1099 MISC				15		
16	Gross amount of payment card/third				16		
17	Professional gambler winnings from	Form W2-G	6		17		
18	Gross installment sales less cost of g	goods sold .			18		
19	Returns and allowances				19		
20	Other income				20		
In	ventory (Enter "X" where applied	,					
21	Method(s) used to value closing inve			Lower of cost of			
22	Any change in determining quantities	s, costs, or v	valuations betwee	n opening and closi	ng inven —		Yes No
						Current Year	Prior Year Amount
23	Inventory at the beginning of year .				23	Amount	Amount
24	Purchases less cost of items withdra				24		
25	Cost of labor	•			25		
26	Materials and supplies						
27	Other Costs				27		
28	Inventory at end of year				28		
	<u> </u>				_		
As	sets Placed in Service This Year					Date Placed	Purchase
	Description:				_	In Service	Amount
A B					A		
С					B C		
D					D		
E					E		
F					F		
G					G		

	Name	SS	·N	
		30		
Self	Business -Employed Business Expenses Cont. (Schedule C)			
Jen	-Employed Business Expenses Cont. (Schedule C)		Current Year	Prior Year
Expe	nses		Amount	Amount
29	Advertising	29		
30	Contract labor	30		
31	Commissions and fees	31		
32	Depletion	32		
33	Employee benefit programs (other than on line 39)	33		
34	Insurance (other than health)	34		
	Interest:			
35	Mortgage (paid to banks, etc.)	35		
36	Other	36		
37	Legal and professional services	37		
38	Office expense	38		
39	Pension and profit-sharing plans	39		
	Rent or Lease:			
40	Machinery rental or lease	40		
41	Equipment rental or lease	41		
42		42		
43		43		
44		44		
	Other business property rental or lease			· · · · · · · · · · · · · · · · · · ·
45		45		
46		46		
47		47		
48	Repairs and maintenance	48		
49	Supplies (not included in inventory cost of goods sold)	49		
	Taxes and licenses	50		
	Travel and Meals:			
	Travel			
51		51		
52		52		
53		53		
54		54		
	Meals			
55	Enter "X" in the box if subject to DOT hours of service limits	55		
56	Meals subject to the Standard meal allowance that are 100% deductible after			
	the federal M&IE rate is applied	56		
	Meals subject to percentage limitation			
57		57		
58		58		
59		59		
60		60		
61		61		
	Meals not subject to percentage limitation (100% allowed)			
62		62		
63		63		
64		64		
65		65		
66	Utilities	66		
	Wages	67		
	Other Expenses:			
68		68		
69		69		
70		70		
71		71		
72		72		
73		73		
73 74				
74 75		74 75		

Name			SSN	
Business				
ehicle Information (Schedule C)				
	Vehicle - Current Year Amount	Prior Year Amount	Vehicle - Current Year Amount	Prior Year Amount
Date vehicle was placed in service 1	Amount	Amount	Amount	Amount
2 Cost of vehicle				
Total miles driven for the year 3				
Business miles driven during the year 4				
Commuting miles included on line 3 5				
Parking fees and tolls 6				
Vehicle Interest				
Vehicle Personal Property tax 8				
Actual Expenses				
Gasoline, oil and repairs 9				
Vehicle Insurance				
1 Vehicle registration fees				
2 Vehicle lease or rental				
313				
	Walatala		Maktala	
Г	Vehicle - Current Year	Prior Year	Vehicle - Current Year	Prior Year
	Amount	Amount	Amount	Amount
Date vehicle was placed in service 1				
Cost of vehicle 2				
Total miles driven for the year 3				
Business miles driven during the year . 4				
Commuting miles included on line 3 5				
Parking fees and tolls 6				
Vehicle Interest				
Vehicle Personal Property tax 8 Actual Expenses				
Gasoline, oil and repairs 9				
Vehicle Insurance				
1 Vehicle registration fees				
2 Vehicle lease or rental				
3 13				

Name	SON	

Sale of Stocks, Bonds, Real Estate, and Other Non-Business Assets

Installment Sale Inc	come			
New Sale (Only) Note: If the property	was sold this year complete the New Sale	section.		
Description	Selling price including mortgages DO NOT include interest	Mortgages the buyer assumed	Cost or other basis of property	Commissions and other expenses of sale
_				
•				
Description	Date Acqu	ired Date Sold	Interest	Principal
•				
Prior Year Sale (Only)			Paymer	nts Received
Prior Year Sale (Only) Note: If the property wa	as sold in a previous year complete the Prio		ir	n 2024
Prior Year Sale (Only) Note: If the property was Description	as sold in a previous year complete the Prio Date Acqu	ired Date Sold		
Prior Year Sale (Only) Note: If the property was Description	as sold in a previous year complete the Prio	ired Date Sold	ir	n 2024
Prior Year Sale (Only) Note: If the property was Description 1 2 3	as sold in a previous year complete the Prio Date Acqu	ired Date Sold	ir	n 2024
Prior Year Sale (Only) Note: If the property was Description 1 2 3 4	as sold in a previous year complete the Prio Date Acqu	ired Date Sold	ir	n 2024
Prior Year Sale (Only) Note: If the property was Description 1 2 3 4	as sold in a previous year complete the Prio Date Acqu	ired Date Sold	ir	n 2024
Prior Year Sale (Only) Note: If the property was Description 1 2 3 4 5	as sold in a previous year complete the Prio Date Acqu	ired Date Sold	ir	n 2024
Prior Year Sale (Only) Note: If the property was Description 1 2 3 4 5	as sold in a previous year complete the Prio Date Acqu	Payments received in prior years	ir	n 2024
Prior Year Sale (Only) Note: If the property was Description 1 2 3 4 5 6 Description 1 2	As sold in a previous year complete the Prior Date Acque	Payments received in prior years	ir	n 2024
Prior Year Sale (Only) Note: If the property was Description 1 2 3 4 5 6 Description 1 2 3 4 5 6	as sold in a previous year complete the Prior Date Acqu	Payments received in prior years	ir	n 2024
Prior Year Sale (Only) Note: If the property was Description 1 2 3 4 5 6 Description 1 2 3 4 5 6	As sold in a previous year complete the Prior Date Acquired From Date	Payments received in prior years	ir	n 2024
Prior Year Sale (Only) Note: If the property was Description 1 2 3 4 5 6 Description 1 2 3 4 5 6	As sold in a previous year complete the Prior Date Acquired From Date	Payments received in prior years	ir	n 2024

Name ____

SSN ____

	Name	SSN
--	------	-----

Medical and Dental - Itemized Deductions

		Current Year Amount	Prior Year Amount
1	Prescription medications		
2	Fees for doctors, dentists, etc		
3	Fees for hospitals, clinics, etc		
4	Lab and X-ray fees		
5	Medical aids such as glasses, contacts, hearing aids, wheelchair, etc 5		
6	Medical equipment and supplies		
7	Medical mileage (number of miles driven) 7		
8	Medical parking, tolls and local transportation		
9	Lodging for medical purposes		
10	Health/Dental/Other ins. premiums (do not include self-employed plans) 10		
11	Long Term Care insurance premiums (taxpayer)		
12	Long Term Care insurance premiums (spouse)		
13	Expenses to stop smoking		
14	Health insurance premiums - coverage established under your business (1) 14		
15	Health insurance premiums - coverage established under your business (2) 15		
16	Long Term Care insurance premiums - coverage est. under your business (1) . 16		
17	Long Term Care insurance premiums - coverage est. under your business (2) . 17		
18	18		
19	19		
20	20		
21	21		
22	Insurance reimbursement for any medical and dental expense listed above 22		

	Name			_	SSN	
Unr	eimbursed Employee Expenses	- Itemized Dec	ductions			
	List car, truck, transportation, meals and ente			Expenses to		
(Sta	te use only)	Current Year Amount	_	Year ount	Spor Current Year Amount	Prior Year Amount
60	Union and professional dues 60	Amount	Am	June	Amount	Amount
61	Professional subscriptions 61					
62	Uniform and protective clothing 62					
63	Job search costs 63					
64	64					
65	65					
66	66					
67	67					
68	68					
69	69					
Cer	tain Miscellaneous Deductions	Itemized Dedu	uctions			
	te use only)		If inve	stment enter "X"	Current Year Amount	Prior Year Amount
70	Tax preparation fees		<u>.</u>	70		
71	Certain attorney and accounting fees			71		
72	Safe deposit box rental			72		
73	IRA Custodial fees			73		
74	Investment counsel and advisory fees			74		
75	Losses on deposits in insolvent or bankrupt fi	nancial institutions .		75		
76	Convenience fees paid with credit or debit ca	rd for federal taxes in	2024 .	76		
77				77		
78				78		
79				79		
80				80		
81				81		
82				82		
83				83		
84				84		
85				85		
86				86		
Oth	er Miscellaneous Deductions			E	_	
87	Federal estate tax on income in respect of a	decedent		87		
88	Amortizable bond premiums on bonds acquire	ed before 10/23/86 .		88		
89	Gambling losses (if gambling income)			89		
90	Repayment of income			90		
91	From K1 Input Worksheet (1065 & 1120S) - F	Portfolio deduction .		91		
92	Certain unrecovered investment in a pension			92		
93				93		
94				94		
95				95		
96				96		
97				97		
98				98		

	Name	SSN		
Emp	loyee Business Expenses			
Ent	er "X" in one box: Filer Spouse			
Occ	cupation in which you incurred the expenses			
Ent	er "X" if expenses incurred while working as a reservist, performing artist or fee-based g	ov't o	fficial	
with i	RTANT: Per TCJA updates only reservists, qualified performing artists, mpairment-related work expenses can deduct the following business ex information below for certain applicable states that allow the deduction	pens		
Me	als		Current Year Amount	Prior Year Amount
1	Meals	1	, anount	7 milount
2	Enter "X" in the box if subject to DOT hours of service limits	2		
Tra 3	vel Expenses Parking fees, tolls, and transportation, including train, bus, etc., that			
4	DID NOT involve overnight travel or commuting to and from work	3		
	airplane, car rental, etc. DO NOT include meals	4		
Oth	er Employment Related Expenses			
5	Business gifts	5		
6	Employment related education expenses	6		
7	Trade publications	7		
8		8		
9		9		
10		10		
11		11		
12		12		
Em	ployer Reimbursements			
13	Enter employer reimbursements reported under code "L" in box 12 of Form W-2 . $\;\;$.	13		
14 15	Enter other employer reimbursements not reported to you in box 1 of Form W-2 Enter the total expense for meals and entertainment for the period covered by	14		
	the reimbursements	15		

ehicle Information - Unreimbursed	Vehicle -		Vehicle -	
	Current Year Amount	Prior Year Amount	Current Year Amount	Prior Year Amount
1 Date vehicle was placed in service 1				
2 Cost of vehicle 2				
Total miles driven for the year 3				
Business miles driven during the year 4				
Commuting miles included on line 3 5 Average daily roundtrip commuting				
miles				
Parking fees and tolls				
Vehicle Interest 8				
O Vehicle Personal Property tax 9 Actual Expenses				
0 Gasoline, oil and repairs 10				
1 Vehicle Insurance				
2 Vehicle registration fees 12				
3 Vehicle lease or rental				
414				
5 Value of employer-provided vehicle				
(if 100% is included in W-2) 15 _	Vehicle -		Vehicle -	
(if 100% is included in W-2) 15	Vehicle - Current Year Amount	Prior Year Amount	Vehicle - Current Year Amount	Prior Year Amount
	Current Year		Current Year	
Date vehicle was placed in service 1	Current Year		Current Year	
Date vehicle was placed in service 1	Current Year		Current Year	
Date vehicle was placed in service	Current Year		Current Year	
Date vehicle was placed in service	Current Year		Current Year	
Date vehicle was placed in service	Current Year		Current Year	
Date vehicle was placed in service	Current Year		Current Year	
Date vehicle was placed in service 1 Cost of vehicle 2 Total miles driven for the year 3 Business miles driven during the year 4 Commuting miles included on line 3 Average daily roundtrip commuting miles 6 Parking fees and tolls 7	Current Year		Current Year	
Date vehicle was placed in service	Current Year		Current Year	
Date vehicle was placed in service 1 Cost of vehicle 2 Total miles driven for the year 3 Business miles driven during the year 4 Commuting miles included on line 3 Average daily roundtrip commuting miles 6 Parking fees and tolls 7 Vehicle Interest 8 Vehicle Personal Property tax 9 Actual Expenses	Current Year		Current Year	
Date vehicle was placed in service	Current Year		Current Year	
Date vehicle was placed in service . 1 Cost of vehicle . 2 Total miles driven for the year . 3 Business miles driven during the year . 4 Commuting miles included on line 3 . 5 Average daily roundtrip commuting miles	Current Year		Current Year	
Date vehicle was placed in service 1 Cost of vehicle 2 Total miles driven for the year 3 Business miles driven during the year 4 Commuting miles included on line 3 Average daily roundtrip commuting miles 6 Parking fees and tolls 7 Vehicle Interest 8 Vehicle Personal Property tax 9 Actual Expenses Gasoline, oil and repairs 10 Vehicle Insurance 11 Vehicle registration fees 12	Current Year		Current Year	
Date vehicle was placed in service	Current Year		Current Year	
Date vehicle was placed in service	Current Year		Current Year	

Name

SSN ____