## **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 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23	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-NISC)  Interest income? (include form(s) 1099-NISC)  Interest income? (include form(s) 1099-NISC)  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 barter your services for goods or services from someone else?  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 receive employer-provided adoption benefits for a previous year?  Did you make a loan to someone at an interest rate below market rate?  Did you make a loan to someone at an interest rate below market rate?  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
	<u> </u>	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?
	·	
Yes	No	Business and Rental Property Income & Deductions
		If you own rental property, do you qualify as a Real Estate Professional?
		Did you start or acquire a new business?
	] 3	Did you sell any part of an existing business, or sell business assets?
	<b>⊢</b>	Did you cease operating any business or rental property?
	5	Did you remove any of your business assets for personal use?
	<b>⊢</b>	Did you use part of your home for business purposes?
	<b>⊢</b> 7	Did you make any contributions to a Keogh or a self-employed SEP plan for 2024?
	<b>⊢</b> 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?
	3 4	Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official? Did you incur any travel and entertainment expenses for business purposes?
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Yes	4 5 6 7 8 9 10 11 12 13 14 15	Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?  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 unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?  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 non-cash donations?  Did you make gifts of more than \$18,000 to any one person?  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 1 2	Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?  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 unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?  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	Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?  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 non-cash donations?  Did you donate a vehicle?   Miscellaneous  Did you make gifts of more than \$18,000 to any one person?  Did you refinance a mortgage 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 unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?  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 recei	ive it?			
		Check sent to you in the mail		Other quick re	fund via a bank pro	oduct
		Apply to next year's estimates				
		Direct deposit (please provide voided bla	ank check)	Type of account:	Checking	Savings
		If you owe taxes, how do you want to pay them?				
		Paper check sent with my return	Credit card	Installment Ag	reement	
		Direct debit (please provide a voided bla	nk check)	Type of account:	Checking	Savings
	3	Do you want to allow your tax preparer to discuss If no, enter another person (if desired) to be allow	•			
		Designee's name	Phone Number		Personal identific Number (5 digit l	

Name		SSN	
arm Rental Income and Expenses			
Enter "X" in one box: Filer Spouse			
General Information			
Federal Employer Identification Number (do not enter Social Security Number)			
2 Description of the principal crop or activity			
3 Did you actively participate in the operation of this farm? Enter "X" in the app			No
		Current Year	Prior Year
Farm Rental Income		Amount	Amount
4 Income from production of livestock, produce, grains, and other crops	4		
5 Total cooperative distributions	5		
6 CCC loans reported under election	6		
7 Total CCC loans forfeited	7		
8 Crop insurance proceeds and certain disaster payments	8		
9 If election to defer, "X" the box	9		
Amount deferred from last year	10		
Other income (including Federal and state gasoline or fuel tax credit or refund)	Г		
11	. 11		
12	. 12		
13	13		
14	. 14		
15	15		
Assets Placed in Service This Year	ſ	Date Placed	Purchase
(Description):	ŀ	In Service	Amount
A	. <b>A</b>		
B	. В		
C	C		
D	. D		
EF	. E   F		
「 G	G		
н	. н		

	Name	SSN				
	Activity					
Far	m Rental Expenses Cont.					
			Current Year	Prior Year		
Expe 16	Chemicals	46	Amount	Amount		
17	Conservation expenses					
	·					
18	Custom hire (machine work)					
19	Employee benefit programs (other than on line 28)	19				
20	Feed purchased	20				
21	Fertilizers and lime	21				
22	Freight and trucking	22				
23	Gasoline, fuel, and oil	23				
24	Insurance (other than health)	24				
25	Mortgage (paid to banks, etc.)	25				
26	Other					
27	Labor hired (less employment credits)					
28	Pension and profit-sharing plans					
	Rent or lease:	20	ı	ı		
29	Machinery rental or lease	29				
30	Equipment rental or lease					
31		31				
32		32				
33		33				
34		34				
35		35				
36		36				
	Other (land, animals, etc.)					
37		37				
38		38				
39		39				
40		40				
41		41				
42		42				
43		43				
44		44				
45		45				
46	Repairs and maintenance	46				
47	Seeds and plants purchased	47				
48	Storage and warehousing	48				
49	Supplies purchased	49				
50	Taxes	50				
51	Utilities	51				
52	Veterinary, breeding, and medicine	52				
	Other Expenses:					
53	Meals	53				
54		54				
55		55				
56		56				
57		57				
58		58				
59		59				
60		60				

	Activity				
Vel	nicle Information - Farm Rental	Vehicle -		Vehicle -	
		Current Year Amount	Prior Year Amount	Current Year Amount	Prior Year Amount
1	Date vehicle was placed in service 1	Amount	Amount	Amount	Amount
2	Cost of vehicle				
3	Total miles driven for the year 3				
4	Business miles driven during the year 4				
5	Commuting miles included on line 3 5				
6	Parking fees and tolls 6				
7	Vehicle Interest				
8	Vehicle Personal Property tax 8				
_	actual Expenses				
9	Gasoline, oil and repairs 9				
10	Vehicle Insurance				
11	Vehicle registration fees				
12	Vehicle lease or rental				
13	13				
		Vehicle - Current Year Amount	Prior Year Amount	Vehicle - Current Year Amount	Prior Year Amount
1	Date vehicle was placed in service 1	Amount	Amount	Amount	Amount
2	Cost of vehicle				
3	Total miles driven for the year 3				
4	Business miles driven during the year . 4				
5	Commuting miles included on line 3 5				
6	Parking fees and tolls 6				
7	Vehicle Interest				
8	Vehicle Personal Property tax 8				
9	Gasoline, oil and repairs 9				
10	Vehicle Insurance				
11	Vehicle registration fees				
12	Vehicle lease or rental				
13	13				
				i	

Name \_\_\_\_

SSN \_\_\_\_

	Name	SSN	
ar	m Income and Expenses		
	Enter "X" in one box: Filer Spouse		
G	eneral Information		
1	Federal Employer Identification Number (do not enter Social Security Number)	<u></u>	
2	Principal crop or activity		
3	Accounting Method Enter "X" in the appropriate box	Cash	Accrual
4	Did you "materially participate" in this business? Enter "X" in the appropriate box	Yes	No
F.	averal language. Cook Mathod (Llog only if each mothod of accounting)	Current Year	Prior Year
г 6	arm Income - Cash Method (Use only if cash method of accounting)  Sales of livestock and other items purchased for resale	Amount	Amount
7			
8	Cost or other basis of livestock and other items reported on line 6 above		<del> </del>
9	Total cooperative distributions		
9 10	Agricultural program payments		
11	Commodity Credit Corporation loans reported under election		
12	Total Commodity Credit Corporation loans forfeited		
13	Crop insurance proceeds and certain disaster payments received in 2024		1
14	If election to defer, "X" the box		
15	Amount deferred from 2023	<del></del>	
16	Custom hire (machine work)		
17	Other income, including Federal and state gasoline or fuel tax credit or refund 17		
Fa	arm Income - Accrual Method (Use only if accrual method of accounting)	Current Year Amount	Prior Year Amount
 18	Sales of livestock and other items purchased for resale	Amount	Amount
19	Total cooperative distributions		
20	Agricultural program payments		
21	CCC loans reported under election		
22	Total CCC loans forfeited		
23	Crop insurance proceeds		
24	Custom hire income		
25	Other income, including Federal and state gasoline or fuel tax credit or refund 25		
26	Inventory of livestock, produce, grains, and other products at beginning of the year . 26		
27	Cost of livestock, produce, grains, and other products purchased during the year 27		
28	Inventory of livestock, produce, grains, and other products at end of year 28		
A	ssets Placed in Service This Year	Date Placed	Purchase
	(Description):	In Service	Amount
Α	A		
В	В		
С	с		
D	D		
E	E		
F	F		
G	G		<del> </del>
Н	н I		1

N	ame		SSN	
	incipal crop or activity			_
	m Expenses Cont.			
	•		Current Year	Prior Year
Expe		_	Amount	Amount
29	Chemicals			
30	Conservation expenses			
31	Custom hire (machine work)			
32	Employee benefit programs (other than on line 41)			
33	Feed purchased	33		
34	Fertilizers and lime	34		
35	Freight and trucking	Ī		
36	Gasoline, fuel, and oil	36		
37	Insurance (other than health)	37		
	Interest:	г	ı	
38	Mortgage (paid to banks, etc.)			
39	Other	. 39		
	Labor bired (loce ampleyment are dita)	40		1
40 41	Labor hired (less employment credits)			
41	Pension and profit-sharing plans	41		
	Rent or lease:	Г		1
42	Machinery rental or lease	T T		
43	Equipment rental or lease			
44		_ 44		
45		_ 45		
46		_ 46		
47		_ 47		
48		_ 48		
49	Others (Level and residuals at a)	49		
<b>E</b> 0	Other (land, animals, etc.)	<b>50</b> [		
50 51		_ 50 51		
52		52		
53 54		_ 53		
54 55		_ 54		
55 56		_ 55 		
56 57		_ 56		
57 50		_ 57 _ 58		
58		_ 30 [		
59	Repairs and maintenance	. 59		
60	Seeds and plants purchased	. 60		
61	Storage and warehousing	. 61		
62	Supplies purchased	62		
63	Taxes	63		
64	Utilities	64		
65	Veterinary, breeding, and medicine	65		
	Other Expenses:	F		-
66	Meals	_ 66		
67		67		
68		68		
69		69		
70		_ 70		
71		_ 71		
70		70		

	Principal crop or activity				
Veh	icle Information - Farm				
- 01		Vehicle -		Vehicle -	
		Current Year	Prior Year	Current Year	Prior Year
	_	Amount	Amount	Amount	Amount
1	Date vehicle was placed in service 1				
2	Cost of vehicle				
3	Total miles driven for the year 3				
4	Business miles driven during the year 4				
5	Commuting miles included on line 3 5				
6	Parking fees and tolls 6				
7	Vehicle Interest				
8	Vehicle Personal Property tax 8				
Α	ctual Expenses			1	
9	Gasoline, oil and repairs 9				
10	Vehicle Insurance				
11	Vehicle registration fees				
12	Vehicle lease or rental				
13	13				
		Vehicle -		Vehicle -	
	Γ	Current Year	Prior Year	Current Year	Prior Year
		Amount	Amount	Amount	Amount
1	Date vehicle was placed in service 1				
2	Cost of vehicle				
3	Total miles driven for the year 3				
4	Business miles driven during the year . 4				
5	Commuting miles included on line 3 5				
6	Parking fees and tolls 6				
7	Vehicle Interest				
8	Vehicle Personal Property tax 8				
	ctual Expenses				
9	Gasoline, oil and repairs 9				
10	Vehicle Insurance				
11	Vehicle registration fees				
12	Vehicle lease or rental				
13	13				
. •					

Name \_\_\_\_

SSN \_\_\_\_