

Henry B. Murphy, Jr.

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2025 INCOME TAX ORGANIZER

1. If you were married or divorced, if your spouse died, if you had a child, if you moved, or had any other life event, please give us the particulars feel free to call first to talk it over. Include any notes about changes in your dependents (such as a new member of the household, change in student status, moved out of the house, etc.)

2. Copy of last year's federal and state return if we did not prepare your return

3. Please let us know your electronic banking preferences. All returns that can be e-filed will be.
If you are using a new bank account, please give me the RTA and the account number.

	Yes	No	I will let you know
Electronically deposit the refund?			
Electronically pay the balance due?			

4. How would you like to get a copy of your return?

PDF with password, which will be your SS or EIN with dashes?	
PDF without password?	
Good old-fashioned hardcopy?	

5. As was true last year, those who got their health insurance through the Exchange may be eligible for premium tax credit or need to pay back the advanced premium tax credit incorporated in their monthly bill. If you received a Form 1095-A, Health Insurance Marketplace Statement, we need it to do your return. The penalty for having no health insurance has expired for Federal purposes but has entered the New Jersey picture. If you had none, you can work with us about the exceptions that might apply.

6. Any federal and state tax correspondence or forms you received.

7. Dates and amounts of estimated tax payments:

	Date paid or Applied	Federal Amount	State Amount
Applied:			
1st.			
2nd.			
3rd.			
4th.			
w/ Extension:			
Total			

8. All W-2's & 1099s & 1098s including wages, non-employee compensation, retirement income, interest and dividends, sales of stock and bonds, prizes etc.

9. Purchase information for any stocks, bonds, or mutual funds sold, including dividend reinvestments if not already on your 1099B
10. Income and expense from rental properties and businesses. Call us if you would like a preprinted worksheet. If you prefer, we can send you an organizer with last year's captions and amounts and a column at the end for the current year.
11. Copies of K-1's from partnerships, subchapter S corporations, trusts and estates.
12. IRA/Keogh/SEP contribution and rollover information.
13. NJ property tax deduction/credit requires total rent paid if you rent. NJ is threatening to require Block and Lot for the deduction, so include it here if I do not already have it.

NJ Block and Lot # for owners if we do not already have them	
NJ rent paid?	
NJ property tax paid if not provided below?	

14. Student loan interest paid and postsecondary education expenses for self, spouse, or dependent. If you are no longer a dependent but your parents pay YOUR student loan interest, you can deduct it on your return. They cannot deduct it on theirs. If you got a 1098-T, we need it.
15. Child (under 13) care expenses for working (or looking for work) parent credit can be up to 35% or \$3,000 for one child or \$6,000 for two or more:

	Child 1:	Child 2:
Tax ID if provider not tax exempt:		
Name of provider:		
Address of provider:		
Amount of expenses paid:		

16. Purchase or sale of residence:
If old residence used for business or used as home less than two years, please call first to discuss.
Purchase of new: Closing papers and any "points" paid outside of closing.
17. Educator expenses for K-12 teachers up to \$300:
18. Itemized deductions if you think you may have enough. When available, please provide the actual 1098s or other official documents.

Medical expenses including insurance and mileage (NJ has 2% threshold here)	
Interest on home mortgage & home equity loans or details of refinance, including "points"	
Charitable contributions, cash and non-cash, as well as mileage	
Real estate taxes	
Investment interest (margin interest)	

Any questions? Just call!