

## PLEASE PROVIDE UPDATED INFO

### TAYPAYER

Driver license number: \_\_\_\_\_

Issue date (mm/dd/yyyy): \_\_\_\_\_

Expiration date (mm/dd/yyyy): \_\_\_\_\_

Email: \_\_\_\_\_

### SPOUSE

Driver license number: \_\_\_\_\_

Issue date (mm/dd/yyyy): \_\_\_\_\_

Expiration date (mm/dd/yyyy): \_\_\_\_\_

Email: \_\_\_\_\_

## TAX ORGANIZER - 2024

<u>Taxpayer Name</u>	<u>Spouse Name</u>
<u>SSN</u>	<u>SSN</u>
<u>Date of Birth</u>	<u>Date of Birth</u>
<u>Occupation or Retirement Date</u>	<u>Occupation or Retirement Date</u>
<u>Address</u>	<u>Preferred Phone</u>
<u>City, State &amp; Zip</u>	Cell
	Home

### Dependents:

Relationship	Name	Number of Months lived with you	SSN and Date of Birth
1			- - / /
2			- - / /
3			- - / /
4			- - / /

**If you have a refund, do you want to use "Direct Deposit?"** Yes \_\_\_\_ No \_\_\_\_

If Yes:

Routing # \_\_\_\_\_

Account # \_\_\_\_\_

Circle  
Checking or Savings

**(PLEASE ATTACH VOIDED CHECK)**

### INCOME-Attach Support Documents

**Please Check Items Attached**

W-2'S	Rental - 1099 MISC	Rental Income & Expenses	Self-Employment - NEC
Interest - 1099 INT	K-1 - Partnerships	Alimony Amount Paid and Received	Gambling Winnings
Dividend - 1099 DIV	K-1 - S Corporations	Unemployment	Broker Statements
Retirement - 1099 R	K-1 - Trust/Estates	Director Fees	Social Security Benefits
Oil & Gas - 1099 MISC			

**Did you, your spouse, or any dependents receive an identity protection (pin) from the IRS?**  
 Yes \_\_\_\_ No \_\_\_\_ (If yes, attach IRS letter)

**Did you receive a notice from the IRS or State?**  
 Yes \_\_\_\_ No \_\_\_\_ (If yes, attach letter)

**Did you get form 1095 A for healthcare?**  
 Yes \_\_\_\_ No \_\_\_\_ (If yes, please attach)



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**RETIREMENT CONTRIBUTIONS**

Did you make retirement contributions for tax year 2024 or do you intend to?

	TAXPAYER	SPOUSE
IRA - Traditional	_____	_____
IRA - Roth	_____	_____
Date Paid	_____	_____
Date to be Paid	_____	_____
QCD from RMD	_____	_____
Attach any Forms		

**Foreign Bank Account or Digital Assets**

Do you have an interest in or signature authority over one or more foreign accounts?

Did you receive, sell, or exchange of an interest in any virtual currency such as Bitcoin, Ethereum, or other digital assets?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Yes

\_\_\_\_\_ No

**ESTIMATED TAX PAYMENTS MADE - 2024**

Schedule of Estimates	Federal Payment Amount	State Payment Amount	Date Paid
1st			
2nd			
3rd			
4th			
Extra			
Extra			

**We are no longer able to verify your estimated tax payments through the IRS website. You must provide this information to us. Attach cleared checks if possible.**



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## ADJUSTMENTS AND DEDUCTIONS

<u>Charitable Contributions</u>	<u>Amount</u>
1	
2	
3	
4	
Miles Driven for charity	
<b>Non-Cash Gifts - Attach Receipts</b>	
You must have a receipt from the charity for all individual gifts in excess of \$250. Non-cash gifts in excess of \$500 require a valuation statement from the charity.	

<u>Medical-Out of Pocket</u>	<u>Amount</u>
Hospital Ins. Premiums	
Miles Traveled for Medical	
Prescription Drugs	
Doctors, Dentists, Etc	
Eyeglasses & Dentures	
Hospitals & Clinics	
Other:	
Total:	

<u>Interest</u>	<u>Amount</u>
Mortgage-1st	

<u>Miscellaneous</u>	<u>Amount</u>
Gambling Losses	
Do you have adequate substantiation? Yes ___ No ___	

<u>Property Tax</u>	<u>Amount</u>
Primary Residence	
2nd Home	

<u>Child Care Expenses</u>	<u>All info is required</u>
If you paid child care to enable your spouse to work:	
Name(s) of Dependent	
Amount for each dependent	
Care Provider	
Provider Tax ID or SSN:	

<u>Electric Vehicle Credit</u>
Did you take delivery of a qualifying clean vehicle?
_____ Yes                  _____ No

<u>Energy Efficient or Residential Clean Energy Credit</u>
Did you make eligible home improvements in 2024?
_____ Yes                  _____ No

## PRIVATE SCHOOL TUITION IN LA - 2024 Grades K-12

Dependent	School	Private Y or N	Tuition & Fees	Uniforms	Text-books	Supplies	Total

121 Julia Street, West Monroe, LA 71291  
telephone. 318-325-0483 facsimile. 318-325-0453

[www.kndcpa.com](http://www.kndcpa.com)

### College Tuition-Attach Form 1098T

<p><b>Did you buy or sell your home this year?</b> If yes, attach HUD statement.</p>
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