2025 Individual Tax Organizer (Form 1040) - Filing Due April 15, 2026

This organizer is intended to be a helpful guide and is NOT an exhaustive list of every possible tax-related item, deduction, or income source. Tax laws are complex and constantly changing. You must **supply all documents and information** related to your income, payments, investments, assets, and expenses for the year, **even if they are not specifically listed here**. Missing documents or failing to report income may result in penalties or inaccurate returns. Please contact us immediately if you have any unusual or complex transactions, such as foreign assets, inheritance, large sales, or any items not addressed in this organizer.

Instructions: Please complete all sections that apply to your situation and upload all required source documents (W-2s, 1099s, etc.) to the client portal at https://fourseasonstaxandaccounting.taxdome.com.

Section 1: Personal & Dependent Information

	Taxpayer	**Spouse**
Full Name		
Social Security Number		
Date of Birth		
Occupation		
IP PIN (if applicable)		
Email Address		
Phone Number		
Filing Status (Circle one):	Single / Married Joint / Married Separate / HOH / Widow(er)	

A. Dependents

Name	SSN	Date of Birth	Relationship	Lived with You (Y/N)
1.				
2.				
3.				
4.				
5.				
6.				

B. Banking Information (For Refund/Payment)

✓	Type	Routing Number	Account Number
	Direct Deposit (Refund)		
	Direct Debit (Tax Due)		

Section 2: Income Documents

Please provide **ALL** forms reporting income received during 2025.

✓	Income Type	Required Form(s)	Amount / Notes
	Wages/Salary	W-2	
	Interest Income	1099-INT	
	Ordinary & Qualified Dividends	1099-DIV	
	Stock/Investment Sales	1099-B, Brokerage Statements (Need Cost Basis if not on 1099-B)	
	Retirement Distributions	1099-R	
	Social Security	SSA-1099	
	Unemployment Compensation	1099-G	
	State/Local Tax Refund	1099-G	
	Business/Contractor Income	1099-NEC, 1099-K, or Internal Records	

✓	Income Type	Required Form(s)	Amount / Notes
	Partnership, S-Corp, or Fiduciary Income	Schedule K-1 (Forms 1065, 1120-S, or 1041)	
	Rental/Royalty Income	Schedule E Summary (Income & Expense by Property)	(Attach full expense list, including depreciation info)
	Farm Income	Schedule F Summary (Income & Expense)	(Attach full income/expense list, including depreciation info)
	Sale of Business Assets	Sales documents and records of Original Cost and Prior Depreciation	(For assets used in a business/rental, filed on Form 4797)
	Miscellaneous Income	Form 1099-MISC (Prizes, attorney payments, other income)	
	Gambling Winnings	Form W2-G, or Personal Win/Loss Records	(Losses are only deductible if you itemize on Schedule A, up to the amount of winnings)
	Jury Duty Pay	Court or Employer Records	(This is taxable income.)

✓	Income Type	Required Form(s)	Amount / Notes
	Cancellation of Debt (COD)	**Form 1099-C (For credit cards, settlements, etc. over $600)**	**(Taxable unless exclusion (bankruptcy/insolvency) applies via Form 982)**
	Alimony Received (Date of Divorce/Separation: ___________)		
	Digital Assets (Cryptocurrency)	**Brokerage/Exchange Statements, Records of Transactions**	**Did you receive, sell, send, exchange, or otherwise acquire any digital assets in 2025? (Y/N)**

Section 3: Adjustments to Income (Above-the-Line)

These are deducted regardless of whether you itemize.

✓	Adjustment Type	Required Form/Information	Amount / Notes
	Educator Expenses (K-12 teacher/aide)	Receipts (up to $300 per person)	
	HSA Contributions	Form 5498-SA	
	IRA Contributions (Traditional)	Statement showing 2025 Contribution Amount	
	Student Loan Interest Paid	Form 1098-E	
	Self-Employed Health Insurance Premiums	Records of premiums paid	
	Alimony Paid (Recipient's SSN: __________)		
	Qualified Auto Loan Interest Deduction (OBBBA)	1098-E from lender, VIN, purchase date, and vehicle details	Max $10,000 deduction. Must be a new, U.S.-assembled vehicle loan originated after 12/31/2024.

✓	Adjustment Type	Required Form/Information	Amount / Notes
	Qualified Tip Income Deduction (OBBBA)	**Total reported tips (W-2 Box 7 or 1099/personal logs)**	**Max $25,000 deduction for reported tips (Subject to MAGI limits).**
	Qualified Overtime Compensation Deduction (OBBBA)	**W-2/Pay Stubs showing FLSA Overtime Pay**	**Max $12,500 deduction ($25,000 MFJ) for the "half" portion of "time-and-a-half" overtime pay.**
	Additional Deduction for Seniors (OBBBA)	**Taxpayer/Spouse Age (65+ in 2025)**	**Additional $6,000 deduction per eligible person (Subject to MAGI limits).**

Section 4: Itemized Deductions (Schedule A)

Note: Only complete this section if you plan to **itemize** (i.e., your total deductions exceed the Standard Deduction).

A. Medical & Dental Expenses

✓	Description	Required Form/Information	Amount Paid in 2025
	Unreimbursed Medical/Dental Expenses	Totaled summaries from receipts, providers, and insurance statements	(Applies to amount that exceeds 7.5% of AGI)
	Medical Mileage (Total miles driven for medical care)	Log of miles, dates, and purpose (Total Miles: __________)	(The value is based on the IRS mileage rate for 2025, which may be adjusted mid-year)

B. Taxes Paid

✓	Tax Type	Amount Paid in 2025
	State/Local Income Tax Withheld	(From W-2s, 1099s)
	Estimated State/Local Tax Payments Made	
	Real Estate Taxes Paid on Primary Residence	

C. Home Mortgage & Interest

✓	Description	Required Form/Information	Amount Paid in 2025
	Mortgage Interest Paid & PMI	**Form 1098**	**(Includes Mortgage Interest, PMI, and Points Paid)**

D. Charitable Contributions

✓	Description	Required Form/Information	Amount / Notes
	Cash Contributions	Receipts (must have a record for all cash)	
	Non-Cash Contributions	List of items, fair market value	
	Mileage Driven for Charity (Total miles)		

D. Other Miscellaneous Deductions

✓	Description	Required Form/Information	Amount / Notes
	Gambling Losses	**Totaled summary of losses sustained**	**(Deductible only up to the amount of winnings)**

Section 5: Credits & Payments

✓	Credit/Payment Type	Required Form/Information	Amount / Notes
	Estimated Federal Tax Payments	Records of 2025 Form 1040-ES payments	
	Child & Dependent Care Credit	Provider Name, Address, Tax ID/SSN, and amount paid	
	Education Expenses (AOTC/LLC)	Form 1098-T and receipts for required books/supplies	
	Health Insurance Marketplace	Form 1095-A (Crucial for Premium Tax Credit)	
	New Clean Vehicle Credit (EV) (OBBBA)	Binding contract & nominal payment required by 09/30/2025.	Up to $7,500 for new qualifying EVs. (Income limits apply)
	Used Clean Vehicle Credit (EV) (OBBBA)	Binding contract & nominal payment required by 09/30/2025.	Up to $4,000 (or 30% of price, whichever is less) for used qualifying EVs under $25k. (Lower income limits apply)
	Alt. Fuel Refueling	Receipts/Invoices showing cost and date installed	Up to $1,000 for home EV charging equipment. (Must

✓	Credit/Payment Type	Required Form/Information	Amount / Notes
	Property Credit (EV Charger)		be placed in service by 06/30/2026)
	Residential Clean Energy Credit (Solar, Battery)	Receipts/Invoices showing cost and date installed	30% credit for solar, storage, etc. Expires Dec 31, 2025 (OBBBA).
	Energy Efficient Home Improvement Credit (HVAC)	Receipts/Invoices for qualified hot water heater, AC, furnace, or heat pump	30% credit up to $3,200 annual cap. Expires Dec 31, 2025 (OBBBA).
	Foreign Bank Accounts	Do you have a financial interest in or signature authority over foreign financial accounts? (Y/N)	

Section 6: Wisconsin State Specific Items

✓	WI Item Type	Required Form/Information	Amount / Notes
	WI Long-Term Care Insurance Deduction	Records of **Premiums Paid** for Qualified LTC Insurance	(This is a deduction for premiums paid, regardless of the Federal AGI test)
	WI K-12 Private School Tuition Subtraction	Receipts/Statements for Tuition Paid, Student Name, Grade Level	(Max: $4k per K-8 student; $10k per 9-12 student)
	WI College Savings Deduction (529 Plan)	**Total 2025 Contributions** to Wisconsin's **Edvest** or **Tomorrow's Scholar** 529 Plan	(Max Deduction: $5,130 per beneficiary for MFJ)
	WI Veterans Property Tax Credit	Copy of **Property Tax Bill** & **WDVA Eligibility Certification**	(100% disability rating required)
	WI Homestead Credit	**Property Tax Bill** or **Rent Certificate (Form 1099-H)**, plus **full list of household income sources**	(Income based credit for low-income filers)
	WI Military Retirement Pay Subtraction	1099-R for Military Retirement Pay (WI exempts most)	