

# 2025 INDIVIDUAL TAX ORGANIZER



ROBERTS & EDDY, P.C.

ATTORNEYS AT LAW

2349 Jamestown Ave, Suite 4 • Independence, Iowa 50644

## PERSONAL INFORMATION

	Taxpayer (T)	Spouse (S)
First & Last Name		
Social Security Number		
Date of Birth		
Occupation		
Email Address		
Phone Number		
Address		

## FILING STATUS

Single    
  Married Filing Jointly    
  Married Filing Separately    
  Head of Household    
  Qualified Widow

Year of Spouse's Death: \_\_\_\_\_

Yes      No    
 Are you or your spouse blind?

        
 Are you or your spouse disabled?

        
 Are you or your spouse a full-time student

        
 Do you or your spouse want to donate \$3 to the Presidential Election Campaign Fund?

## DEPENDENTS (CHILDREN & OTHERS)

Full Name	Relationship	Date of Birth	Social Security Number	Months Lived With You In 2025	Disabled (Y/N)	Full Time Student (Y/N)	Dependent's Gross Income In 2025

## BANK INFORMATION

Yes      No    
 If you have a tax refund, do you want the funds direct deposited?

        
 If you have a tax liability, do you want funds automatically withdrawn?

If you have a new bank account for direct deposit or automatic withdrawal, please update your information below:

Name of Bank	Routing Number	Account Number	Type of Account	
			Checking	Savings
			<input type="checkbox"/>	<input type="checkbox"/>



# INCOME

## WAGES (PROVIDE W-2s)

T/S	Employer's Name

## NONEMPLOYMEE COMPENSATION (PROVIDE 1099-NEC)

T/S	Payer's Name

## INTEREST INCOME (PROVIDE 1099-INT)

T/S	Payer's Name	Account Number

## DIVIDEND INCOME (PROVIDE 1099-DIV)

T/S	Payer's Name	Account Number

## INVESTMENTS SOLD (PROVIDE 1099-B)

T/S	Payer's Name	Account Number

## PENSIONS, ANNUITIES, IRAs, ETC. (PROVIDE 1099-R)

T/S	Payer's Name	Account Number

## MISCELLANEOUS INCOME (PROVIDE 1099-MISC)

T/S	Employer's Name

## PARTNERSHIPS, C-CORPS, TRUSTS, ESTATES (PROVIDE K-1)

T/S	Entity's Name

If you had income from any of the following sources, please check the applicable box and provide documentation of such income.

- Social Security (SSA-1099)
- Railroad Retirement Benefits (RRB-1099)
- Unemployment Compensation or Other Government Payments (1099-G)
- Gambling Income (W2-G)
- Digital Assets (1099-DA)



# DEDUCTIONS

	Amount	
	Taxpayer	Spouse
Contributions made to a Self-Employed Pension Plan (SEP), SIMPLE, or Solo 401K		
Contributions made to an Individual Retirement Account (IRA)		
Contributions made to a Roth IRA		
Interest Paid on Student Loans (Provide 1098-E)		
Contributions to Health Savings Accounts (Provide 5498-SA)		
Long-Term Care Premiums Paid		
Alimony Paid		
Educator Expenses <i>(If you're an educator, enter the amount you paid for classroom supplies)</i>		
Union and Professional Dues		
Safe Deposit Box Rental		
Tax Preparation Fees		
Amish Aid <i>(Only for Amish)</i>		

## OUT-OF-POCKET MEDICAL EXPENSES

Description	Amount
Fees Paid to Doctors, Dentists, Etc.	
Prescription Drugs/Medication	
Lodging	
Glasses/Contacts	
Hearing Aids	
Dentures	
Medical Miles Driven	
Other Medical Expenses	

## CHARITABLE CONTRIBUTIONS

Charity Name	Donation Amount

## MORTGAGE INTEREST (PROVIDE 1098)

Lender's Name	Interest Paid

## TAXES PAID

Type	Amount
Real Property	
Personal Property	

# HEALTH INSURANCE

Please check all boxes that apply and provide the applicable form.

	Health Insurance Marketplace Statement Form 1095-A	Health Coverage Form 1095-B	Employer-Provided Health Insurance Offer and Coverage Form 1095-C
Taxpayer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# CREDITS



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## CHILD CARE EXPENSES

Name of Care Provider	Address	Social Security Number	Amount Paid for Each Child

## COLLEGE TUITION & EDUCATION EXPENSES

Description	Amount
Tuition Paid to a College or Trade School (Provide 1098-T)	
Books, Supplies, and Equipment for College (Provide Receipts)	
Contribution to Iowa College Savings Fund	
Private School Tuition & Textbooks K-12	
Extra-Curricular Activities Expense K-12	

## MISCELLANEOUS

	Yes/No
Volunteer Firefighter/EMS Credit	
Solar/Wind/Geothermal Installed in 2025	
Wood Stove Installed in 2025	

# ESIMATED TAX PAYMENTS

Did you make any quarterly estimated tax payments to be applied toward your 2025 tax liability?

### FEDERAL

Due Date	Amount Paid
04/15/2025	
06/15/2025	
09/15/2025	
01/15/2026	

### STATE

Due Date	Amount Paid
04/30/2025	
06/30/2025	
09/30/2025	
01/31/2026	

If a due date falls on a Saturday, Sunday, or legal holiday, the payment will be on time if you make it on the next business day.

I AFFIRM AND CERTIFY THAT ALL THE INFORMATION AND ANSWERS TO QUESTIONS HEREIN ARE COMPLETE, TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF, AND THAT THE INCOME AND EXPENSE INFORMATION SET FORTH ON THESE WORKSHEETS ARE SUBSTANTIATED BY WRITTEN RECORDS MAINTAINED BY THE UNDERSIGNED. SPECIFICALLY, WRITTEN RECORDS ARE MAINTAINED FOR ALL BUSINESS DEDUCTIONS CLAIMED FOR VEHICLES (AUTOS, PICKUPS, ETC.), COMPUTERS AND ANY OTHER ENTERTAINMENT, RECREATION OR AMUSEMENT PROPERTY WHICH WERE UTILIZED FOR BOTH PERSONAL AND BUSINESS PURPOSES.

\_\_\_\_\_  
Signature of Taxpayer