

# 2025 Tax Organizer

Taxpayer Name: \_\_\_\_\_ Taxpayer Occupation: \_\_\_\_\_  
Spouse Name: \_\_\_\_\_ Spouse Occupation: \_\_\_\_\_  
Phone number: \_\_\_\_\_ Drop off date: \_\_\_\_\_  
Email: \_\_\_\_\_ Tax preparer: \_\_\_\_\_

## CHANGES TO PERSONAL INFORMATION

1. Do you have a change of address? Yes No

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip Code

2. Is there a change in your filing status? Yes No

Single Married Head of Household

*(If newly married in 2025, you must include copy of spouse's ID and Social Security card.)*

3. Do you have a new dependent to claim? Yes No

- Would you like to establish a Trump account for your children under the age of 18?

Yes No

Full name: \_\_\_\_\_

DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

*(You must include copy of social security card & birth cert.)*

4. Electronic direct deposit/withdrawals are MANDATORY for 2025. If you do not have us submit your balance due, you must go to IRS.GOV/Payments to submit payments on your own.

Bank Routing #: \_\_\_\_\_

Bank Account #: \_\_\_\_\_

Checking Savings

2025 Balance Due

2026 Quarterlies Pmts

## INCOME & OTHER TAX FORMS

W-2s and 1099s for all forms of income or investments

Form K-1 from a business tax return

Schedule C (self-employment) information, including any short-term gig jobs

Schedule E (rental) information

Do you have an HSA account? If so, please provide form 1099-SA

Tuition forms 1098-T and receipts or student loan interest form 1098-E

Did you receive an Identity PIN letter from the IRS?

If you had Overtime or Tips, include your last paystub.

Provide winter/summer tax bill.

If you purchased a NEW vehicle in 2025, please provide purchase agreement and interest paid on vehicle in 2025.

Estimated Tax Payments, copies must be provided for all quarters.

Did you sell, exchange, or dispose of any virtual currency?

Did you have Marketplace Insurance? If so, please provide a copy of form 1095-A

Any other changes we should know about?

## Engagement Letter

Please thoroughly read the following statements and sign at the bottom to acknowledge and confirm your understanding.

Thank you for choosing B&G Accounting & Tax Service of Troy to assist you with your 2025 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2025 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer is enclosed to help you collect the data required for your return. The organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcation or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee is based on the time required at standard billing rates plus out of pocket expenses. Invoices are due and payable upon presentation or tax return may not be filed. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location for seven (7) years. We retain copies of your records and our work papers from your engagement for up to three (3) years, after which these documents will be destroyed.

If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax return documents carefully before signing them. Our engagement to prepare your 2025 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated. We will start working on your return once taxpayer and spouse have signed this document.

Thank you for the opportunity to be of service. If you have any questions, contact our office at (248) 543-6820

Sincerely,

B&G Accounting & Tax Service of Troy

Accepted By:

Taxpayer: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse: \_\_\_\_\_ Date: \_\_\_\_\_

