

# 2025 PERSONAL INCOME TAX ORGANIZER COMPREHENSIVE ACCOUNTING SERVICES

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**Please return this form in an envelope marked "Attn: Tax Department" to ensure processing is not delayed**

The information required on this form is pertinent to the preparation of your INCOME TAX RETURN and relates to you and your family personally, and not to your business operations. Please complete and return to us as soon as possible, BUT NO LATER THAN MARCH 6th. **WE MUST HAVE THIS SIGNED AND COMPLETED DATA SHEET TO PREPARE YOUR TAX RETURN.** You are cautioned that paid bills and cancelled checks claimed by you as deductions herein, must be preserved for a period of at least three years from the date the return is filed. Do not claim as deductions any bills that have not been paid during the year unless they were charged to your credit card before the year end. If we may be of assistance to you in preparing this form, kindly call us at the number above.

Your Full Name	For New Clients Only S.S. # <input style="width: 10px;" type="text"/> - <input style="width: 10px;" type="text"/> - <input style="width: 10px;" type="text"/>	Birthdate / /
Spouses Full Name	For New Clients Only S.S. # <input style="width: 10px;" type="text"/> - <input style="width: 10px;" type="text"/> - <input style="width: 10px;" type="text"/>	Birthdate / /
Mailing Address	Home Phone Number ( <input style="width: 3px;" type="text"/> ) - <input style="width: 3px;" type="text"/>	Work Number
City <input style="width: 10px;" type="text"/> State <input style="width: 2px;" type="text"/> Zip <input style="width: 5px;" type="text"/>	Cell Number ( <input style="width: 3px;" type="text"/> ) - <input style="width: 3px;" type="text"/> - <input style="width: 3px;" type="text"/>	
Your Occupation	Spouse's Occupation	
<b>Identity Protection PIN</b> , if you received a PIN from the IRS, <u>we must have the letter</u> to e-file your returns..  Marital status at 12/31/2025 <input type="checkbox"/> Single <input type="checkbox"/> Married  School District <input style="width: 200px;" type="text"/>		E-mail Address <input type="text"/>  Check if legally blind (H) Yes <input type="checkbox"/> (S) Yes <input type="checkbox"/> Check if \$3 to campaign fund Yes <input type="checkbox"/> No <input type="checkbox"/>  <b>NEW FOR 2025</b> <b>All Refunds must be Direct Deposited. Please enclose a voided check to keep your refund from being delayed.</b> <b>If bank account is the same as last year, check here</b> <input type="checkbox"/>

The state is asking for driver's license or state ID info to help cut down on identity fraud. Please fill in the information below or check one of the boxes if you are not going to furnish this info. Not providing this info WILL slow down any refunds.  
Disregard this if you provided this information last year and your ID didn't expire during the year.

Taxpayer's **DRIVER'S LICENSE or STATE ID** (circle one) #  Issuing State

Issue Date  Exp Date

Spouse's **DRIVER'S LICENSE or STATE ID** (circle one) #  Issuing State

Issue Date  Exp Date

Mark this box if taxpayer doesn't have a license or ID.  Mark this box if spouse doesn't have a license or ID.

Mark this box if the taxpayer DECLINES to provide.  Mark this box if spouse DECLINES to provide.

## **DECLARATION :**

I have provided the information on this form to the best of my knowledge and hereby declare it is complete and ready for the preparation of my/our income tax returns. Where business deductions shown, I acknowledge having spent these amounts and have kept a log of such activities, pursuant to section 274(a) and can fully substantiate such deductions.

**NOTE: PLEASE DO NOT  
FORGET YOUR  
SIGNATURE**

Signature

Date

## DEPENDENTS

Name	Date of Birth	SOCIAL SECURITY NUMBER For New Dependents Only	RELATIONSHIP	MONTHS LIVED IN HOME	MONTHS AS A STUDENT

## HEALTH INSURANCE

If you were covered with health insurance through the Marketplace, we will need **FORM 1095-A**. We must have the form in order to complete your tax return.

## INCOME

### Review for the following:

**Foreign Bank Accounts?** Yes No If Yes and more than \$10,000, send details. **There are SUBSTANTIAL PENALTIES for not providing this information.**

→ **CRYPTO/VIRTUAL CURRENCY:** At any time during 2025, did you receive, sell, exchange or, otherwise dispose of any financial interest in any VIRTUAL CURRENCY? Yes No if yes, please send details of the transactions.

**Wages, Salaries, Tips, Etc.?** Yes No If YES, enclose ALL W-2's  
If you had overtime pay and it is not listed on your W-2, please send in your final paystub along with your W-2.

**NEW - Tips?** Are tips included on your W-2 in box 1? Yes No If Yes and they aren't listed separately on the W-2, we will need information on your tips for the year, such as a last pay stub, forms 4070 or some other report to substantiate them.

**NEW - Overtime?** Yes No If yes, we will need to get a copy of your final paystub from any job with overtime that shows the total overtime paid for the year. Be aware that only the additional 50% is available for the deduction. If you got any double time, it's capped at the additional 50%. We will need documentation on this.

**Interest and Dividends (from Banks & Financial Institutions)?** Yes No If YES, enclose ALL 1099's

**Pensions or IRA Distributions?** Yes No If YES, enclose 1099R's

Did you convert or rollover a traditional IRA into a ROTH IRA? Yes No If YES, enclose 1099R's

Did you receive Alimony? Yes No If YES, how much did you receive? \$ \_\_\_\_\_

## OTHER INCOME

**Estates, Trusts, Partnerships or S-Corps?** (Enclose K-1's) Jury Duty Income \$ \_\_\_\_\_

Tips not reported to your employer? Yes No If YES, how much did you receive? \$ \_\_\_\_\_

**Prizes & Awards?** Yes No If YES, how much \$ \_\_\_\_\_

**State Tax Refund?** Yes No If YES, how much \$ \_\_\_\_\_ If we did your '24 return, we will have this.

**Unemployment Compensation?** Yes No If YES, how much \$ \_\_\_\_\_ attach 1099G's

**Did your dependent child receive Unemployment?** Yes No If YES, please attach 1099G's for each.

**Gambling Winnings?** Yes No If YES, how much \$ \_\_\_\_\_ and attach W-2 G's

**Gains & losses from sale of property, stock, etc.?** Yes No If YES, attach 1099B's

**Social Security?** Yes No If YES, attach SSA 1099's

**Rental Property Income?** Yes No If YES, please call for form or download it at: [www.compacctg.com](http://www.compacctg.com) under Forms & Tools.

Did you have any other income from any other source such as a 1099-MISC? Yes No If YES, enclose 1099s:

Type of work performed: \_\_\_\_\_ Total Income: \$ \_\_\_\_\_

Total income would also include income not reported on a 1099.

Please detail any "ordinary and necessary" expenses associated with the above income below or on a separate sheet. If you want to use mileage for your vehicle, download our Business Use of Vehicle form at [www.compacctg.com](http://www.compacctg.com) under Forms & Tools.

\_\_\_\_\_ \$ \_\_\_\_\_      \_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_      \_\_\_\_\_ \$ \_\_\_\_\_

### **NEW - INTEREST ON VEHICLE PURCHASED IN 2025**

If you purchased a new vehicle in 2025, that was used personally, the interest paid on the loan may be deductible. The loan must be issued by a legitimate lender or dealership and the vehicle's final assembly must be in the USA with a gross vehicle weight rating under 14,000 pounds. You can enter your VIN here to check where your vehicle was assembled: <https://vpic.nhtsa.dot.gov/decoder/>

Please send loan documentation from the bank or bank website. Or provide the following:

VIN \_\_\_\_\_ Interest \_\_\_\_\_ Loan Origination Date \_\_\_\_\_

### **INCOME ADJUSTMENTS**

Did you or your spouse contribute to a   REGULAR IRA,   ROTH IRA?

If YES, how much (You) \$ \_\_\_\_\_ (Spouse) \$ \_\_\_\_\_

Did you pay alimony? Yes No. If YES, how much \$ \_\_\_\_\_ Recipient's name & S.S.# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Date of Divorce: \_\_\_\_\_

Did you contribute to or establish a Health Savings Account? Attach 5498-SA or HSA

Individual Plan Contribution \$ \_\_\_\_\_ or Family Plan Contribution \$ \_\_\_\_\_

### **DEDUCTIONS**

**Standard deductions amounts are \$15,750 Single, \$31,500 Married & \$23,625 Head of Household. If your deductions do not exceed the standard deduction amount for your filing status, we will take the standard deduction and don't need your itemized deductions.**

#### **Taxes:**

Did you pay **Sales** Taxes on **major** purchases last year? Yes No. If YES, how much \$ \_\_\_\_\_

What for? \_\_\_\_\_

Auto License Fees (list years & fees)	Other Taxes:
Year (_____)	\$ _____
Year (_____)	\$ _____
Year (_____)	\$ _____

Real Estate Taxes on main residence: \$ \_\_\_\_\_ Property Taxes on all other real estate Addresses: \_\_\_\_\_ \$ \_\_\_\_\_

Estimated taxes are reported at the bottom of page 4. \_\_\_\_\_ \$ \_\_\_\_\_

### **OTHER DEDUCTIONS**

#### **Interest: (Attach all 1098's)**

1ST HOME	BANK NAME	AMOUNT	2ND HOME	NAME	AMOUNT
Mortgage.....	_____	\$ _____	Mortgage.....	_____	\$ _____
2nd Mortgage.....	_____	\$ _____	2nd Home Mortgage...	_____	\$ _____
Interest paid to an individual? Provide name, address and social security #. _____					
Real Estate Loan Fees _____ \$ _____					
Points Paid _____ \$ _____					

Were any funds used for anything other than to buy, build or improve either home? Yes No. If "Yes", how much? \$ \_\_\_\_\_

### **Contributions: (please note, the IRS will require receipts if audited)**

Church	\$ _____	Colleges	\$ _____
Other	\$ _____	Other	\$ _____

Did you donate any **non-cash items** such as food, clothing or furniture? **Yes** **No**. If YES, attach receipts & list descriptions with thrift store values. We need the values in order to claim the deduction. Blank donation slips aren't acceptable.

**Medical:** please fill in this information and keep all receipts for your records. **Medical deductions must exceed 7.5% of your adjusted gross income to be deductible.**

Medicines / Drugs	\$ _____	Hearing Aids	\$ _____
Doctors / Dentists	\$ _____	Hospital	\$ _____
Eyeglasses	\$ _____	Long Term Care Premiums	You \$ _____ Spouse \$ _____
Medical insurance	\$ _____	Other	\$ _____

### **COLLEGE TUITION**

If you are claiming one or more college students as dependents, provide the following information and attach form 1098-T for each:

How much was actually paid for the student's tuition, fees and course materials during 2025? \$ \_\_\_\_\_

What was the student's first year of college? \_\_\_\_\_

Enrolled for at least one academic period in a degree, certificate, or other program leading to a recognized credential? **Yes** **No**

Did the student carry at least half the normal full-time workload for his/her course of study? **Yes** **No**

**If the student was convicted before the end of 2025 of a felony for possession or distribution of a controlled substance they don't qualify for a schooling credit.**

### **CHILD OR DEPENDENT CARE**

Did you pay for child care expenses last year? **Yes** **No** If YES, complete the following:

NAME OF CHILD	NAME OF PROVIDER	S.S. # or EIN #	ADDRESS OF PROVIDER	AMOUNT PAID
				\$
				\$

### **MICHIGAN HOMESTEAD PROPERTY TAX CREDIT**

#### **For Homeowners:**

**2025 Property Tax BILLED** \$ \_\_\_\_\_ **2025 Taxable Value** \$ \_\_\_\_\_ Not the Equalized Value

#### **For Renters:**

Total Rent Paid in **2025** \$ \_\_\_\_\_ Landlord's Name and Address: \_\_\_\_\_  
Must have this info \_\_\_\_\_

### **OUT OF STATE PURCHASES**

If you made any out-of-state purchases, either by phone, mail order catalog or internet, the State is now requiring you to report it on your Michigan Tax Return. Please list the total dollar amount of purchases made for 2025 (**that you didn't pay sales tax on**) below.

**2025 Out-of-State purchases** \$ \_\_\_\_\_ (**that Sales Tax was NOT paid on**)

### **ESTIMATED TAXES PAID**

CREDIT FROM PRIOR YEAR'S RETURN	FIRST QUARTER (April 15, 2025)	SECOND QUARTER (June 16, 2025)	THIRD QUARTER (Sept. 15, 2025)	FOURTH QUARTER (JAN. 15, 2026)	TOTAL FOR YEAR 2025
Federal	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
State	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
City	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

## Additional Questions

### Personal Information

Did your address change during 2025? \_\_\_\_\_

Can you or your spouse be claimed as a dependent by another taxpayer? \_\_\_\_\_

### Dependents

Did you pay for childcare while you worked or looked for work? If yes, see page 4 for further details.

Do you have any children under age 18 or a full-time college student under 24 with unearned investment income (not wages) more than \$2,700? \_\_\_\_\_

Did you adopt a child or begin adoption proceedings during 2025? \_\_\_\_\_

### Purchases, Sales and Debt

Did you have any debts canceled, forgiven, or refinanced during 2025? \_\_\_\_\_

If yes, please attach all 1099's.

Did you start a new business, purchase a new rental property or farm, or acquire any new interest in a partnership or S Corporation during 2025? \_\_\_\_\_

Did you sell an existing business, rental property, farm, or any existing interest in a partnership or S Corporation during 2025? \_\_\_\_\_

Did you sell, exchange, or purchase any real estate in 2025? If so, please attach closing statements

Did you withdraw any amounts from your IRA or Roth IRA to acquire a principal residence? \_\_\_\_\_

Did you take out a home equity loan in 2025? If yes, provide closing statement. \_\_\_\_\_

What were the funds used for: \_\_\_\_\_

Are you claiming a deduction for mortgage interest paid to a financial institution for which someone else received the 1098? \_\_\_\_\_

Did you pay any student loan interest during the year? Please include statement. \_\_\_\_\_

### Itemized Deductions

Did you contribute property (other than cash) with a fair market value of more than \$5,000 to a charitable organization? \_\_\_\_\_

If yes, you will need to have the property appraised. \_\_\_\_\_

Did you incur any casualty or theft losses during the year? \_\_\_\_\_

If yes, this now only applies if the disaster happened in a federally declared disaster area. \_\_\_\_\_

### Credits

Did you purchase a solar energy system, such as a solar water heater or solar panels? \_\_\_\_\_

If yes, please include a copy of the receipt. \_\_\_\_\_

### Miscellaneous

Did you or your spouse contribute to or establish a medical savings account (MSA) in 2025 or a Health Savings Account (HSA)? \_\_\_\_\_

If yes, how much did you contribute? \_\_\_\_\_

Did you pay any individual \$2,700 or more to perform household services during the year such as babysitting, cleaning, cooking or gardening? \_\_\_\_\_

Were there any changes made to federal or state returns filed in prior years? If yes, provide copies of the correspondence received. \_\_\_\_\_

Did you or your spouse contribute to or establish a Roth IRA or convert an existing IRA into a Roth IRA? \_\_\_\_\_

Questions (continued)

	Yes	No
Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren? .....	<input type="checkbox"/>	<input type="checkbox"/>
Did you withdraw any amounts from a Coverdell Education Savings Account or state education savings plan? .....	<input type="checkbox"/>	<input type="checkbox"/>
If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job? If yes, how many months were you covered? .....	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse receive distributions from long-term care insurance contracts? If yes, please include Form 1099-LTC .....	<input type="checkbox"/>	<input type="checkbox"/>
Did you make gifts of more than \$19,000 to any individual? .....	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any foreign income or pay any foreign taxes during 2025? .....	<input type="checkbox"/>	<input type="checkbox"/>
* Were you or your spouse a grantor or transferor for a foreign trust, have an interest in or a signature or authority over a foreign bank account, securities account, or other financial account in a foreign country? .....	<input type="checkbox"/>	<input type="checkbox"/>
* Did you create or transfer money or property to a foreign trust? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>There are substantial penalties for answering these foreign banking questions incorrectly.</b> <b>We will need to get the details if either of these foreign account information questions apply.</b>		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness .....	<input type="checkbox"/>	<input type="checkbox"/>
Did you engage in any bartering transactions? .....	<input type="checkbox"/>	<input type="checkbox"/>
Did you make a contribution to a state MET or MESP? .....	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a new hybrid vehicle or a plug-in electric vehicle prior to October 1st? If yes, provide a copy of the invoice that includes, make, model and date of purchase.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Sale of Your Home</b>		
Did you sell your home in 2025? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did you (or your spouse if MFJ) own the home as your principal residence for at least two years of the five-year period prior to the sale? .....	<input type="checkbox"/>	<input type="checkbox"/>
Was the home acquired through a tax free (1031) exchange? .....	<input type="checkbox"/>	<input type="checkbox"/>
Did you ever use any portion of the home for business purposes? .....	<input type="checkbox"/>	<input type="checkbox"/>
At the time of sale, was the residence owned by the taxpayer, spouse or both? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>Purchase of Home</b>		
Did you purchase a home in 2025? If yes, please enclose your closing statement. .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>Severance/Retirement</b>		
Did you retire or change jobs in 2025? .....	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive retirement/severance compensation? If yes, date received. .....	<input type="checkbox"/>	<input type="checkbox"/>
Is there a chance you may retire, take a buyout from your job or start collecting Social Security in 2025? .....	<input type="checkbox"/>	<input type="checkbox"/>

**Additional Notes:**

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