



Right On The Money LLC

2024 Income Tax Data Organizer

Taxpayers

Name 1: _____	Name 2: _____
Address: _____	Address: _____
DOB: _____	Home #: _____
SSN: _____	DOB: _____
Cell: _____	Cell: _____
Email: _____	Email: _____

Banking

Bank Name: _____	Account Holder: _____
Routing Number: _____	Account Number: _____
<input type="checkbox"/> Checking	<input type="checkbox"/> Savings
<u>Please select authorized uses for this account.</u>	
Refunds: _____	Tax payments due: _____
Estimates for next tax year: _____	

Dependents

Name	Relationship	SSN	DOB

Items to Bring

Income—*You should bring documentation for all income, which may include:*

<input type="checkbox"/> W2s	<input type="checkbox"/> 1099—all types	<input type="checkbox"/> Social Security statement
<input type="checkbox"/> Government Refund	<input type="checkbox"/> K-1s	<input type="checkbox"/> Unemployment statement
<input type="checkbox"/> Gambling Winnings	<input type="checkbox"/> Business Income	<input type="checkbox"/> Rental Income

Health Insurance—*You should bring verification of health insurance, which may include:*

<input type="checkbox"/> 1099-HC	<input type="checkbox"/> 1095-A	<input type="checkbox"/> 1095-B
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Expenses—*You should bring documentation for expenses that may be itemized, which may include:*

<input type="checkbox"/> Property taxes	<input type="checkbox"/> Excise taxes	<input type="checkbox"/> Mortgage Interest (1098)
<input type="checkbox"/> Charitable Donations	<input type="checkbox"/> Business Expenses	<input type="checkbox"/> Rental Property Expenses
<input type="checkbox"/> Medical Expenses	<input type="checkbox"/> Student Loan Interest	

Education Credits

College Attended: _____

Student: _____

Year(s) in College: _____

Full time _____ Part time _____

___ 1098-T

___ Has this student been convicted of a felony?

___ Years AOTC already taken

College Attended: _____

Student: _____

Year in College: _____

Full time _____ Part time _____

___ 1098-T

___ Has this student been convicted of a felony?

___ Years AOTC already taken

College Attended: _____

Student: _____

Year in College: _____

Full time _____ Part time _____

___ 1098-T

___ Has this student been convicted of a felony?

___ Years AOTC already taken

Daycare

Provider: _____

EIN: _____

Address: _____

Total Paid: _____

Paid For: _____

Provider: _____

EIN: _____

Address: _____

Total Paid: _____

Paid For: _____

Rent

Landlord's name: _____

Landlord's address: _____

Rent paid: _____

IRS Required

Were you or your spouse a member of the Armed Forces at any time during 2022? YES NO

Did you have any interest in or authority over a foreign account or foreign trust? YES NO

Did you receive, sell or exchange any virtual currency? YES NO