



DYNAMIC TAX SERVICES

"The Source of Dynamic Services & Beyond"

Failure to complete this organizer in its entirety could result in delays. Please fill out all 2025 information on the tax organizer pages provided. Please be sure to send secure documents to our portal for security.

Who is the primary contact? Taxpayer Spouse

How do you prefer to be contacted? Phone Email

TAXPAYER INFORMATION

Check box if all contact info is same as prior year:

Legal name: [REDACTED]

Goes by: [REDACTED]

Date of birth: [REDACTED]

Occupation: [REDACTED]

Are you a veteran? Yes No

Email: [REDACTED]

Primary #: [REDACTED]

Address: [REDACTED]

Mailing address (if different): [REDACTED]

SPOUSE INFORMATION

Check box if all contact info is same as prior year:

Legal name: [REDACTED]

Goes by: [REDACTED]

Date of birth: [REDACTED]

Occupation: [REDACTED]

Are you a veteran? Yes No

Email: [REDACTED]

Primary #: [REDACTED]

City: [REDACTED] State: [REDACTED] Zip: [REDACTED]

City: [REDACTED] State: [REDACTED] Zip: [REDACTED]

Marital status (check one): Married Single Separated

Widow(er) Date of spouse's death: [REDACTED]

Will file jointly? Yes No

Did you get married to a same-sex spouse in a state that legally recognizes same-sex marriage? ... Yes No

Can you be claimed as a dependent by another taxpayer? Yes No

Did any of the taxpayers become legally blind or disabled during the year? Yes No

If yes, please explain: [REDACTED]

Do you expect to have all documents submitted in time to file by April 15th? Yes No

If not, do you need an extension payment calculation? Yes No

TAX REFUNDS/PAYMENTS

NOTE: The U.S. Department of the Treasury will no longer issue paper checks.

If you are getting a tax refund, how would you like your money?

Direct deposit into my bank account

Credit to 2025 estimated payments

If you want direct deposit or payment of your taxes from your bank account, please provide:

Financial institution name: [REDACTED]

Routing number: [REDACTED]

Account number: [REDACTED]

Account type: Checking Savings

Account owner: Joint Taxpayer Spouse

To help avoid errors, we strongly suggest you provide us with a copy of a voided check.

If you owe tax, do you want the funds electronically withdrawn from your bank account? Yes No

If yes, on April 15th or another date? *Please note we cannot withdraw owed taxes from bank accounts after April 15th, this does not apply to extensions. [REDACTED]

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DEPENDENT INFORMATION

Name (First, Last)	Relationship	Date of birth	Months lived with you	Disabled	Full time student	Dependent's earned gross income

If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? Yes No

Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,700 (interest, dividends, capital gains)? Yes No

Did you adopt or were you in the process of adopting a child in 2025? Yes No

Did you provide over half the support for any other person(s)

other than your dependent children during the year? Yes No

Did you pay for childcare while you worked, looked for work, or while a full-time student? Yes No

If yes, answer childcare provider information below. *Camps qualify*

Childcare provider	Dependent name	Street address	City	State	Zip	Employer Tax ID # (required)	Amount paid

PURCHASE, SALES AND DEBT INFORMATION Answer all questions and attach any requested documents.

Did you start a new business during the year? Yes No

(Answer questions in the income section regarding businesses)

Did you purchase rental property during the year? Yes No

Attach HUD/Settlement statement

Property address:

(Answer question in the income section regarding rental properties)

NEW CLIENTS ONLY Do you own an interest in a Partnership or S Corporation? Yes No

Attach 2025 K-1 Schedules

Attach 2024 K-1 Schedules (including basis schedule)

Did you sell, exchange, or purchase any real estate during the year? Yes No

Attach closing statement/HUD-sale of property

Attach closing statement/HUD-purchase of property

Attach list of additions/improvements while you owned the property

Attach proceeds from real estate transactions if applicable (Form 1099-S)

Was this your primary residence? Yes No



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PURCHASE, SALES AND DEBT INFORMATION (CONT'D)

Did you foreclose or abandon a principal residence or real property during the year? Yes No
 Did you take out or do you already have a home equity loan? Yes No
 Did you use the proceeds for home improvements? Yes No
 Did you refinance a principal residence or second home this year? Yes No

Attach closing statement/HUD

Did you sell an existing business, rental, or other property this year? Yes
 No Please expl:

Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan? .. Yes No
 Attach cancellation of debt (Form 1099-C) or acquisition or abandonment of Secured Property
 (Form 1099-A)

Did you sell or exchange any digital assets? Yes No

INCOME INFORMATION: PLEASE ANSWER ALL QUESTIONS AND ATTACH ANY APPLICABLE DOCUMENTS.

- Wages: Form W-2 (we suggest you provide the last paycheck stub as well)
- Interest income: Form 1099-INT
- Dividend and distributions: Form 1099-DIV
- Stock sale information/Capital gains: Form 1099-B (Brokerage statements)
- State/local tax refunds: Form 1099-G
- Jury duty income
- Bartering income: Form 1099-B
- Nonemployee Compensation: Form 1099-NEC
- Other Income: Form 1099-MISC

Did you receive any income from property sold prior to this year (such as property sold as an installment
 agreement or owner financed)? Yes No

Did you receive any unemployment benefits during the year? Yes No
 Attach certain government payments (Form 1099-G)

Did you receive any disability income during the year? Yes No

Did you receive tip income not reported to your employer this year? Yes No

Did any of your life insurance policies mature, or did you surrender any policies? Yes No

Did you receive any awards, prizes, hobby income, gambling, or lottery winnings? Yes No

Attach gambling income (Form W-2G)

Attach total of gambling losses

Did you receive any self-employment income to report on your personal tax return? Yes No

Attach form 1099-NEC (nonemployee compensation), 1099-MISC and/or 1099-K and income items
 not included on the form.

Attach business expenses: Provide a list of business expenses or request a business expenses
 template by emailing thedynamictaxservices@gmail.com.

Did you sell, exchange, or purchase any assets used in your trade or business? Yes No



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INCOME INFORMATION (CONT'D)

Did you earn income from a rental property? Yes No

Attach rental income: Miscellaneous information (form 1099-MISC) and income items not included on the form.

Attach rental expenses: Provide a list or request a rental expenses template by emailing
thedynamictaxservices@gmail.com.

FOREIGN INCOME: PLEASE BE AWARE THERE ARE VERY STRICT FOREIGN FILING REQUIREMENTS THAT COULD REQUIRE ADDITIONAL FILINGS

No to all foreign activity

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships, or a foreign employer? Yes No
 Did you receive a distribution from, or were you a grantor or transferor for a foreign trust? Yes No
 Did you have a financial interest or signature authority over a financial account such as a bank account, securities account or brokerage account, located in a foreign country? Yes No

Please explain:

Do you have foreign financial accounts, foreign financial assets or hold interest in a foreign entity? Examples of foreign assets are: foreign stocks or securities, foreign partnership investments, foreign-issued life insurance, or foreign pensions Yes No

RETIREMENT INFORMATION

What retirement accounts do you have (ex. SEP, 401k, Roth IRA etc.) outside of your employer's sponsored plan?

Are you interested in making any additional retirement contributions for 2025 if possible? Yes No

Did you make any withdrawals from an IRA, Roth, Keogh, Simple, SEP, 401(k) or other qualified retirement plan?

Taxpayer: Yes No Spouse: Yes No

Attach distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc. (Form 1099-R). If yes, were any withdrawals due to a federally declared disaster? Yes No

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan?

Taxpayer: Yes No Spouse: Yes No Attach IRA contribution form (Form 5498)

Did you receive Social Security benefits?

Taxpayer: Yes No Spouse: Yes No

Attach Social Security benefit statement (Form SSA-1099)

Find the form here: <https://www.ssa.gov/myaccount/replacement-ssa-1099.html>

Did you receive Railroad Retirement?

Taxpayer: Yes No Spouse: Yes No Attach Railroad benefits (Form RRB-1099)

Have you received notification of Required Minimum Distributions?

Taxpayer: Yes No Spouse: Yes No

Did you receive any Medicaid waiver payments as difficulty of care during the year?

Taxpayer: Yes No Spouse: Yes No

Did you inherit any retirement accounts?

Taxpayer: Yes No Spouse: Yes No



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EDUCATION INFORMATION

Did you, your spouse or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year? Yes No

Attach tuition statement (Form 1098-T)

Did you have educational expenses during the year for yourself, spouse, or a dependent? Yes No

Textbooks: \$ [REDACTED] Parking: \$ [REDACTED] Supplies: \$ [REDACTED] Computer & Software: \$ [REDACTED] Other: \$ [REDACTED]

Did anyone in your family receive a scholarship of any kind during the year? Yes No

Attach tuition statement (Form 1098-T)

Did you pay any student loan interest this year? Yes No

Attach student loan interest statement (Form 1098-E)

Did you cash any Series EE or I U.S. Savings bonds issued after 1989? Yes No

Attach interest income (Form 1099-INT)

Did you make any withdrawals from an education savings or 529 plan account? Yes No

Attach payments from qualified education programs (Form 1099-Q)

Did you make any contributions to an education savings or 529 plan account? Yes No

Amount: \$ [REDACTED]

Did you have teacher/educator classroom expenses? Yes No

Amount: \$ [REDACTED]

HEALTH CARE INFORMATION

Did you have qualifying health care coverage for 2025 for you or your family? Your family, for health care coverage refers to you, your spouse if filing jointly and anyone you can claim as a dependent. Yes No

Attach form 1095

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act or share a policy with anyone who is not included in your family? Yes No

Attach the health insurance marketplace statement (Form 1095-A)

Find the form here: <https://www.healthcare.gov/tax-form-1095/>

Did you make any contributions to a health savings account (HSA) Archer MSA or Medicare Advantage MSA this year? Yes No

Attach contributions from HSA, Archer MSA or Medicare Advantage MSA (Form 5498-SA)

Did you make any distributions from a health savings account (HSA) Archer MSA or Medicare Advantage MSA this year? Yes No

Attach distributions from HSA, Archer MSA or Medicare Advantage MSA (Form 1099-SA)

Did you pay long-term care premiums for yourself or your family? Yes No

Amount: \$ [REDACTED]

If you are a business owner, did you pay health insurance premiums for you and your family? Yes No

Amount: \$ [REDACTED]

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ITEMIZED DEDUCTIONS

MEDICAL EXPENSES

Medical, dental and vision insurance premiums (paid by you after tax) \$
 Prescription drugs \$
 Out of pocket medical expenses not reimbursed by insurance (co-pays, hospital/clinic, glasses, hearing aids, etc.) \$
 Miles driven for medical purposes \$

CHARITABLE CONTRIBUTIONS

Total donations made by cash, check or credit card \$
 Attach a list and provide receipts for all donations
 Miles driven for volunteer work
 Total amount of non-cash donations \$
 For non-cash donations, you must provide a spreadsheet and all donation receipts.
 For an additional copy, please email thedynamictaxservices@gmail.com

Did you donate a vehicle or boat during the year? Yes No
 If yes, attach the contribution of motor vehicles, boats and airplanes (form 1098-C)
 or other written acknowledgment from the Donee organization.

Did you donate stock during the year? Yes No

TAXES PAID

Did you have state taxes paid for prior years (such as balances owed on an installment amt)? Yes No
 Did you make any out-of-state purchases (by telephone, internet, mail or in person) for which
 the seller did not collect state sales tax or use tax? Yes No
 Real estate taxes (provide bills) \$

If in Mecklenburg County, find the documents here: <https://property.spatialest.com/nc/mecklenburg/#/>

Personal property tax (provide bills) \$

If you live in North Carolina and you need to look up automobile tax,
 please use <https://edmv.ncdot.gov/MyDMV/>

Did you make any major purchases during the year (car, boat etc.)? Yes No

INTEREST PAID

Did you pay Mortgage interest? Yes No
 Attach Mortgage interest form 1098

CASUALTY AND THEFT LOSS

Did you incur a casualty or theft loss or any condemnation awards during the year? Yes No
 If yes, did the loss occur in a Federally declared disaster area Yes No
 If yes, describe the property
 Amount of damage: \$
 Insurance reimbursement: \$



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MISCELLANEOUS INFORMATION

Did you make gifts of more than \$19,000 to any individual? Yes No

Did you incur moving costs because of a permanent change of station as a member of the Armed forces on active duty? Yes No

Did you pay any individual as a household employee during the year? Yes No

If yes, please provide payroll forms or fill out estimated tax payments in the estimated tax section below.

Explain: [Redacted]

Did you receive correspondence from the State or the Internal Revenue Service? Yes No

If yes, attach correspondence

Describe: [Redacted]

Did you or a dependent receive an identity protection PIN from the Internal Revenue Service, or have you or a dependent been victim of identity theft? Yes No

Attach IRS letter

Get the IP PIN here: <https://www.irs.gov/identity-theft-fraud-scams/get-an-identity-protection-pin>

Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund Yes No

Did you pay or receive any alimony? Yes No

Amount paid: \$ [Redacted] Or amount received: \$ [Redacted]

Date of divorce decree [Redacted]

Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due? Yes No

ENERGY EFFICIENT CREDITS

Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? If yes, provide bill of sale. Yes No

Did you make energy efficient improvements to your main home this year?

If yes, provide receipts. Yes No

ESTIMATED TAX PAYMENTS

Were you required to pay quarterly federal or state taxes? Yes No

If yes, please fill out the schedule only if paid.

Due Date	Date Paid	Federal Amount	State Amount

Please provide any check images or receipts of the estimated tax payments made.

Do you expect a large fluctuation in income, deductions, or withholdings next year? Yes No

No If yes, please explain: [Redacted]



TAX RETURN FILING

You will have the ability to electronically sign your tax returns this year. Electronic signatures require that each taxpayer have an email address. Please confirm the email addresses you want the tax returns for electronic signatures sent to.

Taxpayer email address:

Spouse email address:

If you are choosing to sign your tax documents electronically, please note we will hold your original hard copies of documents for 30 days after signatures are complete. Please let us know how you will pick your copies up:

- I will come pick up my documents
- Please mail my documents back to me. I understand this will incur a delivery fee of \$25.
- Please email me a scanned copy of my tax documents and shred the originals.

If we do not have a response for you, please understand that we will upload your original tax documents to the secure client portal and shred the originals after 30 days.