INDIVIDUAL TAX ORGANIZER 2025

Bernadette Fisher, Chief Executive Officer/Tax Practioner

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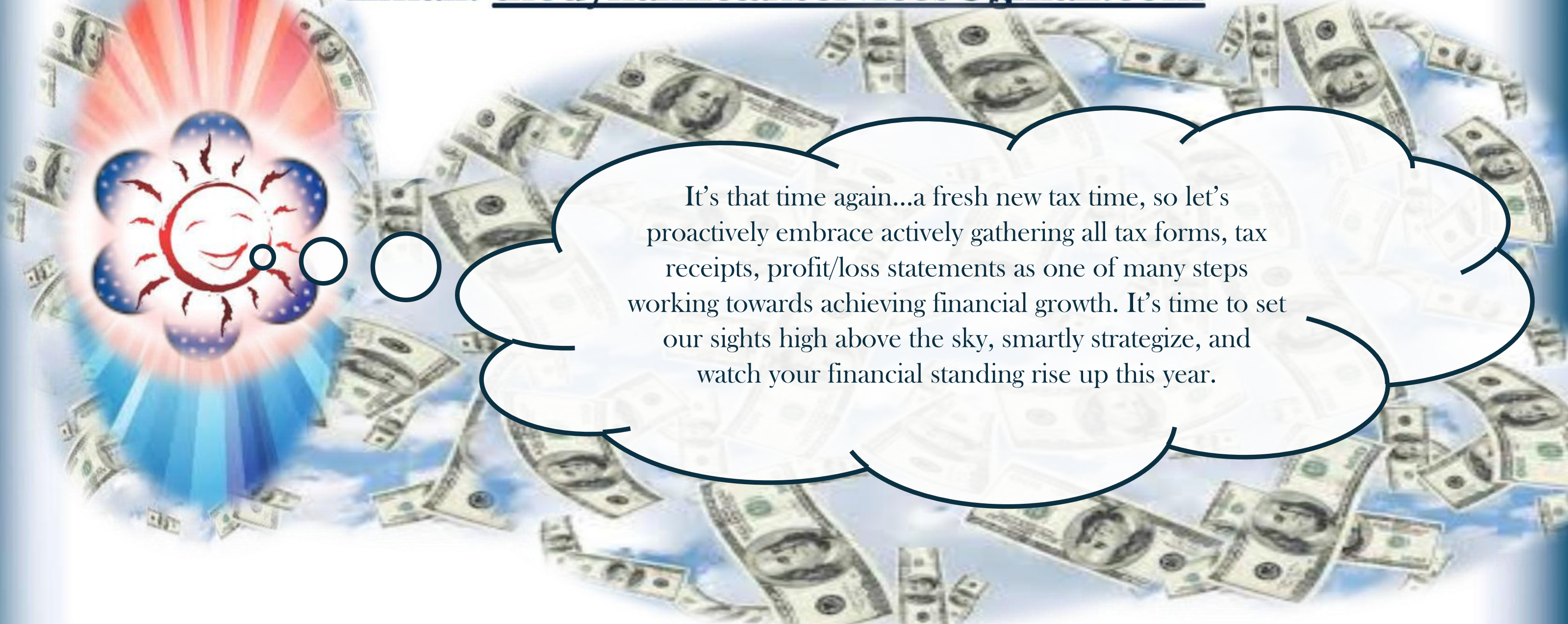

ENGAGEMENT LETTER

Client(s):

We, Dynamic Tax Services, LLC appreciate the opportunity to work with you. This letter is to specify the terms of our engagement, clarify the nature and extent of the services we will provide, and confirm an understanding of our mutual responsibilities. We will not proceed with your tax return until we have a signed Engagement Letter. This letter and any other relevant attachments incorporated herein (collectively, "Agreement"), confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide. The engagement between you and our firm will be governed by the terms of this Agreement.

Engagement Objective & Scope

We will prepare your 2024 U.S. Individual Income Tax Return (Form 1040 and applicable schedules) and/or Federal and State Form(s) 1099 and Transmittal Form 1096 as required by law for the 2024 tax year. A list of all federal and state forms required for filing will be listed on your invoice upon completion of tax returns.

We will not prepare any tax returns except those identified above, without your written request, and our written consent to do so. We will prepare your tax returns based upon information and representations that you provide to us. We have not been engaged to and will not prepare financial statements. We will not audit or otherwise verify the data you submit to us, although we may ask you to clarify certain information.

We will prepare the above-referenced tax returns solely to assist you with your tax filing obligations with the Internal Revenue Service (IRS) and applicable state and local tax authorities. Our work is not intended to benefit or influence any third party, including any entity or investment which may seek to evaluate your creditworthiness or financial strength. You agree to indemnify and hold us harmless from any and all claims arising for the use of the tax returns for any purpose other than complying with your tax filing obligations regardless of the nature of the claim, excepting claims arising from our gross negligence or intentional wrongful acts.

Dynamic Tax Services Firm Responsibilities

It is our duty to prepare your returns based on the same standard of care that all reasonable tax return preparer would exercise in this type of engagement. Unless otherwise noted, the applicable standard of care for a "reasonable tax return preparer" shall be based solely upon the following assertions of the Internal Revenue Code, Treasury Regulations, and any applicable state, local corollaries.

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Dynamic Tax Services Firm Responsibilities (Cont'd)
As tax return preparers, these statements also prohibit us from signing a tax return unless we reasonably belief that there is substantial authority for tax positions taken on the tax return, or we have a basis for tax return positions taken on the return which are disclosed as required by the code. If you request that we report a tax position on your return which we feel is contrary to published guidance, frivolous, or a willful attempt to evade tax, we will be unable to proceed. If you are unwilling to disclose a position where required or we conclude that your failure to disclose does not permit us to sign your tax return, we will be unable to proceed. If you are unwilling to disclose a position where required or we conclude that your failure to disclose does not permit us to sign your tax return, we will be unable to proceed.

It is your responsibility to safeguard your assets and maintain accurate records pertaining to transactions. We will not hold your property in trust for you, or otherwise accept fiduciary duties in the performance of the engagement.

We will prepare your tax returns based upon your filing status (single, married filing jointly, married filing separately, head of household or qualifying window(er) with dependent child) as reflected in your income tax returns for last year. **If your filing status has changed, you wish to change your filing status, or you have questions about your filing status, please contact us immediately.**

Dynamic Tax Services, LLC will not make any management decisions or perform management functions on our behalf.

Confidentiality
If the tax returns prepared in connection with this engagement are filed using the married filing jointly filing status, both spouses are deemed to be clients of the firm under the terms of this Agreement. Both spouses acknowledge that any tax return information, including supporting documents provided to us, used in the preparation of your joint return, and any communications made to us by either of you in connection with the preparation of your joint tax return, may ultimately be shared with either spouse, without prior consent of the other.

Prior Year Review
Our review of the prior years' tax returns will necessarily be limited and may not find errors. We will, however, bring to your attention errors that we do find. Similarly, if you become aware of any information affecting your prior year tax returns, please contact us. If an error or information affecting prior tax returns is discovered by your or us, we will discuss resolution options with you. If you ask us to prepare amended tax returns, and we agree, we will confirm this engagement in a separate written agreement.

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Estimated Tax Payments
You may be required to make quarterly estimated tax payments. We will calculate these payments for the 2025 tax year based upon the information you present to prepare your 2024 tax returns ("safe harbor" rule). Updating recommended payments to more closely reflect your actual current year's income is not within the scope of this engagement. If you would like us to provide this service, we will confirm this update in a separate engagement letter.

Tax Planning Services
Our engagement does not include tax advice which would impact future tax years. However, we may communicate potential tax strategies to you, and you may ask question of us. It is your responsibility to communicate to us, in writing, any interest in pursuing a tax strategy identified, or if you require more than a cursory response to your question. If we determine that assisting you with the implementation of any proposed tax strategy, or responding to your question requires additional research, analysis, discussion, or documentation, we will confirm our understanding with you in writing prior to proceeding.

We shall not be liable for any forgone tax or other benefits if you fail to advise us of your desire to investigate or pursue any tax strategy communicated to or by us. Any tax advice described in tis paragraph and provide to you shall be governed by this Agreement and billed at our standard rates.

Government Inquiries
This engagement does not include responding to inquiries by any governmental agency or tax authority. If your tax return is selected for examination or audit, you may request our assistance in responding to such an inquiry. If you ask us to represent you, we will confirm this representation in a separate engagement letter.

Third-Party Verification Request
We will not respond to any request from banks, mortgage brokers or others for verification of any information reported on these tax returns. We do not communicate with third parties or provide them with copies of tax returns.

Divorce
If you inform us of your pending divorce, we will advise each of you to seek independent tax advice. As you may have conflicting interest with your spouse, you will both be required to sign a conflict of interest waiver. We will not be able to advise either of you until your divorce is finalized. Consequently, we will require a letter of instruction from both of your divorce attorneys identifying items needed to prepare your tax return and your agreement before the tax returns can be prepared. For example, if your income tax return filing status is an item about which we will

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Divorce (Cont'd)
need instruction. Electing a filing status of married filing jointly establishes joint liability for taxes owed and requires that certain tax related decisions be made prior to the preparation of income tax returns. In the event you elect to file separate tax returns, you will both be required to sign new engagement letters prior to the preparation of your tax returns.

Arguable Positions
If there are conflicting interpretations of tax law, or if tax law is unclear, we will explain the possible position that may be taken in order for us to sign your return. We will follow the position you request, provided it is consistent with our understanding of tax reference materials and our professional standards. Tax reference materials include, but are not limited to the Code, Court Cases, and similar state ad local guidance. If the IRS, state or local tax authorities later contest the position you select, additional tax, penalties, and interest may be assessed. You will be responsible for these amounts, as well as any related professional fees you may incur, to respond to the tax authority.

Abusive Tax Strategies
Certain tax position or strategies, while not currently identified as "abusive" by the IRS, may ultimately be determined to be so in the future. Consequently, you agree to advise us of any transaction you have entered into that entitles you to disproportionate tax benefits (deductions, credits, or refunds), that generates significant income deferral or non-recognition, or that generates significant tax losses without corresponding cash impacts. If you fail to timely notify us, in writing, or any abusive tax strategy you have entered into, you will be responsible for any liability, including but not limited to, additional tax, penalties, interest and related professional fees.

Client Responsibilities
You acknowledge and agree that your failure to comply with the responsibilities enumerated in this section may result in economic or other loss to you, such as disallowance of tax deductions or credits claimed, additional tax, penalties or interest assessed against you, or loss of administrative rights. You agree to accept responsibility for any consequence of your failure to fulfill your responsibilities.

We will provide you with an income tax organizer to help you compile and document the information necessary to prepare your income tax returns. You are responsible for fully and accurately completing the income tax organizer, including any activities in which you engage outside the U.S. or your home state.

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All Income
You are responsible for identifying and communicating to us all income earned and received by you from any U.S. or non U.S. source. This includes income earned from gambling and online wagers, gig or hobby work, and activity for which you should receive a Form 1099-K (online sales) whether or not you actually receive a 1099-K.

Documentation
You are responsible for maintaining adequate documentation to substantiate the accuracy and completeness of your tax returns. Our records are not a substitute for yours. You should retain all documents that provide evidence and support for reported income, credits, deductions, and other information on your tax returns, as required under applicable tax laws and regulations. You represent that you have such documentation and can produce it, if necessary, to respond to any examination or inquiry by tax authorities. You will be responsible for any liability, including but not limited to, additional tax, penalties, interest and related professional tax fees, resulting from disallowance of tax deductions due to inadequate documentation.

Gift Tax Returns
The preparation of gift tax returns is not within the scope of this engagement. The IRS considers a gift to be any transfer to an individual, either directly or indirectly, where full consideration (measured in money or money's worth) is not received in return. Under federal tax law, certain gifts are taxable and subject to an annual gift tax exclusion amount, which for 2024, is $18,000.00 per taxpayer. You are responsible for informing us if you have made any transfer of value for which you did not receive full consideration , such as, but not limited to, those made in trust, forgiveness of debt, or the use of property for which no or below-market rent was charged.

Gifts received from foreign persons
The preparation of IRS Form 3520 is not within the scope of this engagement. If you transferred property to or received property from a foreign person or trust or are a U.S. person who "owns" assets in a foreign trust, you may be required to file a separate IRS Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts or Form 3520-A, Annual Information Return of Foreign Trust with a U.S. Owner. You are responsible for providing us with details of any cash, property, or value exchanged with foreign persons or trusts, or of ownership of foreign assets, including access to foreign bank or investment accounts.

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Communication

In connection with this engagement, we may communicate with you or others via email transmission. As emails can be intercepted and read, disclosed, or otherwise used or communicated by an unintended third party, or may not be delivered to each of the parties to whom they are directed and only such parties, we cannot guarantee or warrant that emails from us will be properly delivered and read only by the addressee. Therefore, we specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure of emails transmitted by us in connection with the performance of this engagement. In that regard, you agree that we shall have no liability for any loss or damage to any person or entity resulting from the use of email transmissions, including any consequential, incidental, direct, indirect, or special damages, such as loss of revenues or anticipated profits, or disclosure or communication of confidential or proprietary information.

Personal Expenses

You are responsible for ensuring that personal expenses, if any, are segregated from business expenses and that expenses such as meals, travel, entertainment, vehicle use, gifts, and related expenses are supported by necessary records required by the IRS and other tax authorities. At your written request, we are available to provide you with written answers to your questions on the types or supporting records required.

State and Local Filing Obligations

You are responsible for fulfilling your filing obligations with any state or local tax authorities, including but not limited to, income, franchise, sales, use, and property taxes or abandoned and unclaimed property. The preparation of any state or local tax return not listed above is not within the scope of our engagement. If upon review of the information you have provided to us, including information that comes to our attention, we believe that you may have additional filing obligations, we will notify you. You will be responsible for tax due and penalties associated with the failure to file or untimely filing of any form for which we were not engaged to prepare.

U.S. Filing Obligations Related To Foreign Investments and Activities

U.S. Citizens and residents generally must report income and activities related to both domestic and foreign assets (worldwide income). You are responsible for fulfilling your filing obligations related to foreign activity where required. U.S. reporting requirements related to foreign activity are vey complex. Therefore, contact us **immediately** if you have:

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- Ownership of, investment in, or officer responsibilities for a corporation, partnership, or other business entity formed under the laws of another country;
- Fiduciary, grantor, or beneficiary relationships in connection with an entity formed under the laws of another country;
- Ownership of, signature authority over, or control over any financial account held in a financial institution located in another country;
- Citizenship or government-approved employment/visa status with a country other than the U.S. (including anyone in your immediate household; or parents who live outside the U.S.);
- Transferred property, including cash, offshore either directly or through the purchase of or investment in an entity formed under the laws of another country;
- Received or have legally recognizable rights to receive property, including cash, from a trust, business, or investment formed under the laws of another country or individual residing in another country;
- Conducted business with any entity or person physically located in another country, regardless of whether such business is for-profit, not for-profit, or informal irregular;
- Received property including cash, or income from a source outside of the U.S. which is not reported on a brokerage statement (such as a 1099-B or similar report); or Any other activity or economic arrangement which takes place outside of the U.S.

Based upon the information you provide, we will use this data to inform you of any additional filing requirements, which may include FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). The FBAR is not a tax return and its preparation is not within the scope of this engagement.

Failure to timely file the required forms may result in substantial civil and/or criminal penalties. By your signature below, you agree to provide us with complete and accurate information regarding any foreign investments in which you have a direct or indirect interest, or over which you have signature authority, during the above referenced tax year. If you have any questions regarding the application of the reporting requirements for your foreign interests or activities, please ask us and we will respond in writing. You will be responsible for tax due, penalties, and interest associated with the failure to file or untimely filing of any of these forms.

Foreign Filing Obligations
You are responsible for complying with the tax filing requirements of any other country. You acknowledge and agree that we have no responsibility to raise these issues with you and that foreign filing obligations are not within the scope of this engagement.

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Digital Assets
There are specific tax implications of investing in digital assets (e.g. virtual currencies such as Bitcoin, non-fungible tokens, virtual real estate and similar assets). The IRS considers these to be property for U.S. Federal Income Tax purposes. As such, any transactions in, or transactions that use, digital assets are subject to the same general tax principles that apply to other property transactions.

If you transacted in digital assets during the 2024 tax year, you may have tax consequences and/or additional reporting obligations associated with such transactions Depending on the nature or volume of those transactions, a change to the scope of our services may be required. You are responsible for providing us with complete and accurate information, including basis, regarding any transactions in, or transactions that have used, digital assets during the appliable tax year.

Other Income, Losses, and Expenses
If you realized income, loss or expenses from a business or supplemental income or loss, the reporting requirements of federal and state income tax authorities apply to such income, loss or expense. You are responsible for complying with all applicable laws and regulations pertaining to such operations, including the classification of workers as employees or independent contractors and related payroll tax and withholding requirements.

Ultimate Responsibility
You have final responsibility for the accuracy of your tax returns. We will provide you with a copy of your electronic tax returns and accompanying schedules and statements for review prior to filing with the IRS, state and local tax authorities, as applicable. You agree to review and examine them carefully for accuracy and completeness.

You will be required to review and sign a completed Form 8879, IRS e-file Signature Authorization, and any similar state and local equivalent authorization forms before your returns can be filed electronically. For joint returns, both spouses must sign the e-file authorization in order to ensure its validity. We shall not be liable for any penalties or interest resulting from your failure to timely sign and return Form 8879 or state equivalents. **We will not file an extension on your behalf if you fail to timely sign and return Form 8879 or state equivalents.**

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Timing of the Engagement

We expect to being our services upon receipt of this executed Agreement, the completed 2024 Income Tax Organizer and all documents requested either in the organizer or by our office.

Our Services Will Conclude upon written notification by either party that the Agreement is terminated, or one (1) year from the execution date of this Agreement, whichever comes first

Extensions of Time to File Tax Returns

The original filing due dates for your tax returns are April 15, federal and state. **Due to the high volume of tax returns prepared by our firm, you must provide the information needed to prepare the tax returns no later than March 31, 2025. Failure to do so may result in the inability to complete your returns by the original filing due dates.**

It may become necessary to apply for an extension of the filing due dates if there are unresolved issues or delays in processing or if we do not receive all of the necessary information from you on a timely basis. Applying for an extension of time to file may limit your ability to make certain elections, extend the time available for a government agency to undertake an examination of your return and/or extend the statute of limitations to file legal action. If we apply for an extension of the time to file because you have not provided us all of the information needed to prepare the tax returns by the original due date, you agree to hold our firm harmless from any consequences arising from any election waived. All taxes owed are due by the original filing due date. Additionally, extensions may affect your liability for penalties and interest or compliance with governmental or other deadlines.

If you wish to engage our firm to apply for extensions of time to file tax returns on your behalf, we will not file these applications unless and until we received both an executed copy of this Agreement and your express written authorization to file for an extension. In some cases, your signature may be required on such applications prior to filing. Failure to timely request an extension of time to file can result in penalties for failure to file tax returns, which accrue from the original due date of the returns and can be substantial.

Penalties and Interest Charges

Federal, state and local tax authorities impose various penalties and interest charges for non-compliance with tax laws and regulations, including failure to file or late filing of returns, and

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underpayment of taxes. You will be responsible for the payment of any additional tax, penalties, and interest charges imposed by tax authorities.

E-Filing

If you request that we e-file any form on your behalf, including requests for extensions of time to file, and we agree, the IRS and states require you to sign and return to us the appropriate governmental form(s) before your returns can filed electronically. For joint returns, both spouses must sign the e-file authorization before the return can be transmitted. **If you fail to timely sign and return e-file authorization, we cannot and will not e-file any form on your behalf.** In those situations, you will be solely responsible for any penalties or interest assessed against you.

If you choose not to have any return(s) or extension(s) e-filed, or if your return(s) or extension(s) cannot be e-filed, we will deliver to you paper copy suitable for mailing to the taxing authorities. Once delivered to you, you bear full responsibility for reviewing the paper returns for accuracy, and either signing and timely filing them, along with any payments due, or notifying us of any issue which may need to be addressed prior to filing.

Once our services have concluded, we shall have no obligation to notify you of future tax law developments affecting your tax return(s) except as may be required by the Internal Revenue Service related to errors we identify.

Professional Fee

The professional fee is based upon the complexity of the work performed, our professional time and out-of-pocket expenses. Circumstances may arise that impact our estimated fee such as, but not limited to, issues encountered with the timely delivery, availability, quality, or completeness of the information you provide to us, changes in our personnel or operations that impact our services or other unanticipated items that arise during our engagement and that require additional time in order to complete the agreed-upon services. You agree that you will deliver all records requested and respond to all inquiries made by our staff to complete this engagement on a timely basis. You agree to pay all fees and expenses incurred whether or not we prepare the tax returns.

We appreciate the opportunity to be of service to you. Please date and execute the enclosed Agreement and return in to us to acknowledge your acceptance.

Very truly yours,

Dynamic Tax Services, LLC

I (We) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct and complete to the best of my (our) knowledge.

Taxpayer Signature	Date
Spouse Signature	Date

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DYNAMIC TAX SERVICES

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TAX PREPARATION CHECKLIST

Checklist of Information Needed to Complete Your Tax Return

If any item listed applies to you, please check the box and attach the information.

Income Information:	
	Wages (Form W-2)
	Interest Income (Form 1099-INT)
	Foreign Bank Accounts, Income (+/-) Paid Taxes
	Divdend Income (Form 1099-DIV)
	Stock Sale Information/Capital Gains (Form 1099-B) *Each Stock Sale: Date Purchased, Number of Shares Purchased, Amount Paid
	Other Income *Alimony Received *Unemployment Compensation (Form 1099-G) *Debt Cancellation (Form 1099-C) *Diability Income *Jury Duty
	Small Business (Self-Employment or Independent Contractor Business) *Business Income (Form 1099-MISC plus items not on 1099-MISC) *Business Expenses (Provide list) *Vehicle Information
	Rental Property *Rental Income (Form 1099-MISC) *Related Expenses (Provide list)
	Schedules K-1 from Parternerships, S Corps, Trusts
	Sale of Real Estate not qualifying for Personal Residence Exemption *Closing Statement-Sale of Property *Closing Statement-Purchase of Property *List of additions/improvements while you owned the property *Forgiveness of Debt Income (Form 1099-C or 1099-A)
NOTE: All Tax Documents Are Required Prior To Scheduled Appointment.	

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DYNAMIC TAX SERVICES
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TAX PREPARATION CHECKLIST (Cont'd)

Checklist of Information Needed to Complete Your Tax Return

If any item listed applies to you, please check the box and attach the information.

Income Information:	
	Pension Distributions (Form 1099-R)
	Social Security Benefits (Form 1099-SSA)
	State/Local Refunds (Form 1099-G)
	Gambling Income (Form W-2G)
	Tip Income
	Scholarships (Form 1098-T)
	Education Savings Account Withdrawal (Form 1099-Q)
	Bartering Income (Form 1099-B)
	Achieving Better Life Experience Distribution (Form 1099-QA)
Deduction Information:	
	IRA Contributions
	SEP, Simple, Keogh Plans
	Student Loan Interest (Form 1098-E)
	Student Expenses(Forms 1098-T & 1099-Q)
	Alimony Paid *Recipient Name and SS#
	Mortgage Interest (Form 1098)
	Investment Interest
	Cash and Noncash Charitable Contributions
	Business or Disaster Casualty/Theft Loss

TAX PREPARATION CHECKLIST
(Cont'd)

Checklist of Information Needed to Complete Your Tax Return

If any item listed applies to you, please check the box and attach the information

Deduction Information:	
	Medical Expenses *Health Insurance *Out ~of~Pocket Medical Expenses (Also if applicable include Form 1099-SA)
	Forms 1095-A, 1095-B, 1095-C
	Healthcare Market Place Exemption
	Medical Account Contribution (Form 5498-SA)
	ABLE Account Contribution (Form 5498-QA)
	Real Estate Taxes
	Other (Including Sales Tax Paid on the purchase of autos, boats and RVs for personal use)
Credit and Payment Information:	
	Child Care Expenses *Provide Name, Address, Social Security Number or Employer Identification Number, and amount paid for each child
	Estimated tax payments (dates and amounts paid)
	Legal papers for adoption, divorce or separation involving custody of your dependent children
	Tuition Statements (Form 1098-T) / Eduction Expenses
	Copy of voided check (for direct deposit of refund information)
	Energy or electric vehicle tax credit information
	Closing statement for first-time or long-time homebuyer's credit

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DYNAMIC TAX SERVICES

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This Tax Organizer is designed to help you collect and report the information needed to prepare your 2024 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2024 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2023 information is included for your reference. You do not need to make any 2023 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer yes to any of the questions, be sure to provide the applicable details.

Please provide the information requested on Pages 13-15.

Thank you for taking the time to complete this Tax Organizer.

PERSONAL INFORMATION	YES	NO
1) Did your marital status change during 2024? If yes, please explain.		
2) Do you want to allow your tax preparer to discuss this year's return with the IRS? If no, enter another person (if desired) to be allowed to discuss this return with the IRS. **Caution:** Review any transferred information for accuracy. Designee's Name:__________________________ Phone Number:____________ Personal Identification Number (5 digit PIN): _____________________________	X	
3) Do you or your spouse plan to retire in 2025?		
4) Were you or your spouse permanently and totally disabled in 2024?		
5) Enter date of death for taxpayer or spouse (if during 2024 or 2025): Taxpayer: ___________ Spouse: ___________		
6) Were you or your spouse a member of the U.S. Armed Forces during 2024?		
DEPENDENT INFORMATION		
7) Do you have dependents who must file?		
If yes, do you want us to prepare the tax return(s)?		
8) Do you have children who are under the age of 19 or a full-time student under the age of 24 with an investment income greater than $2600.00?		
If yes, do you want to include your child's income on your return?		
9) Are any of your dependents not U.S. citizens or residents?		
10) Did you provide over half the support for any other person during 2024?		
11) Did you incur adoption expense(s) during 2024?		
IRA, PENSION AND EDUCATION SAVINGS PLANS		
12) Did you receive payments from a pension or profit-sharing plan?		
13) Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?		
14) Did you convert all or part of a regular IRA into a Roth IRA?		
15) Did you roll over all or part of a qualified plan into a Roth IRA?		
16) Did you contribute to an Education Savings Account?		

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ITEMS RELATED TO INCOME/LOSSES		
	YES	NO
17) Did you receive any disability payments in 2024?		
18) Did you receive tip income **not** reported to your employer?		
19) Did you buy, sell, refinance, or abandon a principal residence or other real property in 2024? (Attach copies of any escrow statements or Forms 1099)		
20) If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home?		
21) Are you planning to purchase a home soon?		
22) Did you incur any casualty or theft losses during 2024?		
23) Did you incur any non-business bad debts?		
PRIOR YEAR TAX RETURNS		
24) Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? If **yes**, enclose agent's report or notice of change.		
25) Were there changes to the prior year's income, deductions, credits, etc., which would require filing an amended tax return?		
FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES		
26) Did you have foreign income or pay any foreign taxes in 2024?		
27) At any time during 2024, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?		
28) Did the aggregate value of all your foreign accounts exceed $10,000 at any time during 2024?		
29) Were you the grantor of the transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust?		
30) Did you at any time during 2024 have an interest in or any authority over any foreign accounts or assets (i.e., stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded $50,000 in value at any time during the year?		

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HEALTH & LIFE INSURANCE		
	YES	NO
31) Did you receive Form 1095-A (Health Coverage)? If so, please attach.		
32) Did you or your spouse have self-employment health insurance?		
33) If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?		
34) Did you employer pay premiums on life insurance in excess of $50,000 where the proceeds are payable to beneficiaries named by you?		
35) Did you contribute to or receive distributions from a Health Savings Account (HSA)?		
MISCELLANEOUS		
36) Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024? If **yes**, please include details.		
37) Did you purchase a motor vehicle or boat during 2024? If **yes**, attach documentation showing sales tax paid. Also provide the Vehicle Identification Number (VIN): ______________________		
38) Did you donate a vehicle in 2024? If **yes**, attach Form 1098C.		
39) What was the sales tax rate in your locality in 2024? ________ % State ID: ______________________		
40) Did you or your spouse make gifts of over $18,000 to an individual or contribute to a prepaid tuition plan?		
41) Did you make gifts to a trust?		
42) If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? If **yes**, please attach details.		
43) Did you or your spouse participate in a medical savings account in 2024? If **yes**, please attach Form 1099-SA (Distributions from an HAS, Archer MSA or Medicare+Choice MSA)		
44) Did you make a loan at an interest rate below market rate?		

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MISCELLANEOUS (Cont'd)		
45) Did you pay any individual for domestic services in 2024?		
46) Did you pay interest on a student loan for yourself, your spouse, or your dependents?		
47) Did you, your spouse, or your dependents attend post-secondary school in 2024?		
48) Did a lender cancel any of your debt in 2024? (Attach any Forms 1099-A or 1099-C)		
49) Did you receive any income not included in this Tax Organizer? If **yes**, please attach information.		
50) At any time during 2024, did you: a) receive as a reward, award, or payment for property or services; or b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?		
51) Do you want to change the language with which the IRS communicates with you? If **yes**, which language?		
ELECTRONIC FILING & DIRECT DEPOSIT OF REFUND		
52) If your tax return is eligible for Electronic Filing, would you like to file electronically?		
53) The Internal Revenue Service is able to deposit many refunds directly into taxpayer's accounts. If you receive a refund, would you like a direct deposit? **Caution:** Review transferred information for accuracy.		
54) If **yes**, please provide the following information:		
a) Name of your financial institution: ____________________		
b) Routing Transit Number: ____________________ *(Must Begin With 01 through 12 or 21 through 32)*		
c) Account Number: ____________________		
d) What type of account is this? Checking: ____ Savings: ____ Please attach a **voided** check (not a deposit slip) if your bank account information has changed.		

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HEALTH INSURANCE COVERAGE

Preparer Note: The fields on this form are non-enterable. This worksheet is meant to gather client data only. This worksheet will not transfer to the ProSeries/1040 Product. Data from this worksheet must be manually entered on the appropriate tax form in ProSeries/1040.

PART I (Coverage)

Enter the name, Social Security Number, Date of Birth & Health Insurance Status for each person who you will claim in your return on the table below:

		Covered Exchange Exemption			Indicate which months each person was covered by MEC*:											
Name of Covered Individual(s)	**SSN or DOB**	**12 Mos**	**Policy**	**Received**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**July**	**Aug**	**Sept**	**Oct**	**Nov**	**Dec**
1)																
2)																
3)																

*Minimum Essential Coverage (MEC) includes employer-sponsored coverage, health insurance purchased through the Health Insurance Marketplace (Exchange), Medicare, Medicaid, certain VA coverage, Tricare, etc.

For tax year 2020, the Federal Affordable Care Act tax penalty has been eliminated, however, you may still be subject to a state tax penalty depending on where you live because some states have created their own individual insurance mandates to replace the federal version. These mandates require state residents to have qualifying health coverage or pay a fee with their state taxes.

Use this worksheet to list the names of individuals listed on the income tax return and their health care insurance coverage status. It will help your tax preparer determine who has health insurance coverage.

If you purchased a health insurance policy from an Exchange or Marketplace, check the Exchange Policy box above. You will receive Form 1095-A from the exchange that issues your policy. Please provide this form with your Organizer documents to your tax preparer.

Please call with any questions on this worksheet.

BUSINESS/INVESTMENT QUESTIONS		
	YES	NO
55) Did you receive stock from a stock bonus plan with your employer? (Do not include stock sales included on your W-2)		
56) Did you buy or sell any stocks or bonds in 2024? If **yes**, attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.		
57) Did you surrender any U.S. savings bonds during 2024?		
58) Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?		
59) Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation?		
60) Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?		
61) Do you have any investments for which you were not personally 'at risk' (other than sole proprietorship or farm)?		
62) Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2024?		
63) Did you sell property or equipment on installment in 2024?		
64) Did you have any business related educational expenses?		
65) Did you do a "like-kind" exchange of property in 2024?		
66) Deduction for travel and meals may be allowed under certain circumstances. Adequate records must be presented. Information must include: 1) Amount; 2) Time and Place; 3) Date; 4) Business Purpose; 5) Description of Gifts; 6) Business Relationship of Recipient Do you have records to support these expenses?		
67) Did you purchase special fuels for non-highway use? If **yes**, please list the type of use and the number of gallons for each fuel. ____________________ ____________________		

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ADDITIONAL INFORMATION
Complete Only Those Schedules That Apply To Your Tax Story. If you have already prepared other Schedules for the necessary information you do not need to re-enter the information. If you have official tax documents with the information (W-2s, 1099s, 1098s, ETC) there is no need to enter that just provide us with the documents. A fully completed organizer lessens the likelihood of omissions from you tax return.

BASIC TAXPAYER INFORMATION	
PERSONAL INFORMATION	
Last Name:	Last Name:
First Name:	First Name:
Middle Initial/Suffix:	Middle Initial/Suffix:
Social Security Number:	Social Security Number:
Occupation:	Occupation:
Work Phone/Extension:	Work Phone/Extension:
Cell Phone:	Cell Phone:
Email Address:	Email Address:
Driver's License/ID Issuing State:	Driver's License/ID Issuing State:
Driver's License/ID Number:	Driver's License/ID Number:
Driver's License/ID Issue Date:	Driver's License/ID Issue Date:
Driver's License/ID Expiration Date:	Driver's License/ID Expiration Date:
Date of Birth:	Date of Birth:
Blind: YES **O** or NO **O**	Blind: YES **O** or NO **O**
Contribute to Presidential Election Campaign Fund: YES **O** or NO **O**	Contribute to Presidential Election Campaign Fund: YES **O** or NO **O**
Eligible to be Claimed as a Dependent on Another Return: YES **O** or NO **O**	Eligible to be Claimed as a Dependent on Another Return: YES **O** or NO **O**

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BASIC TAXPAYER INFORMATION	
PERSONAL INFORMATION (Cont'd)	
Street Address:	
Apartment Number *(If Applicable)*	
City:	State:
Zip Code:	Home Phone:
Foreign Country:	Foreign Phone:
Fax:	Work Phone/Extension:

FILING STATUS				
1 Single	☐	2 Married Filing Jointly	☐	3 Married Filing Separately
			☐	Check this box if you did not live with spouse at any time during the year.
			☐	Check this box if you are eligible to claim spouse's exemption.
			☐	Check this box if your spouse itemizes deductions
4 Head of Household *If the qualifying person is a child but not your dependent, enter...*			☐	
Child's Name:				Child's Social Security Number:
5 Qualifying Surviving Spouse, Check the box for the year the spouse died				2023 ☐ 2022 ☐

DEPENDENT INFORMATION	
FULL NAME *(First Name, Middle Initial, Last Name, Suffix)*	Social Security Number: Relationship:
**For the Dependent Code, Enter the following: L=Dependent Child Who Lived With You N=Dependent Child Who Didn't Live With You Due To Divorce or Separation O=Other Dependent Q=Not A Dependent (But Is A Person Who Qualifies Your Client For The Earned Income Credit and/or The Crediting For Child and Dependent Care Expenses	Date of Birth: Childcare Facility: Childcare Total Expense:

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INTEREST & DIVIDEND INCOME

INTEREST INCOME

T=Taxpayer S=Spouse J=Joint

Attach All Copies Of Your Form 1099-INTs here.

**Type of Interest: Blank=Regular Taxable Interest ME1=ME Bond Interest in Federal Income MD1=MD Nontaxable Interest-Taxable Federal MA1=MA bank interest	NJ=Nontaxable Interest-Taxable Federal OK1=OK Bank Interest WV1=WV Bond Interest In Federal Income TN1=TN Nontaxable Interest-Taxable Federal MD1=MD NH1=NH Nontaxable Interest-Taxable Federal

Place a (√) if you received income from this account in 2024.

DIVIDEND INCOME

Attach All Copies Of Your Form 1099-DIVs Here.

TSJ	X	Payer Name	2024 Box 1a Ordinary Dividends	2024 Box 1b Qualified Dividends	2024 Box 2a Capital Gains	State	2023 Box 1a+2a

MEDICAL & DENTAL EXPENSES

MEDICAL & DENTAL EXPENSES	2024	2023
1 Prescription Medications		
2 Health Insurance Premiums (Enter Medicare B) Exclude Premiums Paid Through An Exchange (Form 1095-A)		
3 Qualified Long-Term Care Premiums		
a Taxpayer's Gross Long-Term Care Premiums		
b Spouse's Gross Long-Term Care Premiums		
c Dependent's Gross Long-Term Care Premiums		
4 Enter Self-Employed Health Insurance Premiums for the appropriate activity on the Page		
5 Insurance Reimbursement		
6 Doctors, Dentists, Etc.		

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MEDICAL & DENTAL EXPENSES

MEDICAL & DENTAL EXPENSES (Cont'd)		
7 Hospitals, Clinics, Etc.		
8 Lab and X-Ray Fees		
9 Expenses for Qualified Long-Term Care		
10 Eyeglasses & Contact Lenses		
11 Medical Equipment & Supplies		
12 Miles Driven For Medical Purposes 01.01.2024-12.31.2024		
13 Ambulance Fees & Other Medical Transportation Costs		
14 Lodging		
15 Other Medical & Dental Expenses:		
a.		
b.		
c.		

TAXES

Enter State & Local Income Taxes:	2024	2023
16. Real Estate Taxes Paid On Principal Residence		
17. Real Estate Taxes Paid On Additional Homes Or Land		
18. Auto Registration Fees Based On The Value Of The Vehicle		
19. Other Personal Property Taxes		
20. Other Taxes:		

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INTEREST PAID AND CASH CONTRIBUTIONS			
HOME MORTGAGE INTEREST PAID			
LENDER'S NAME	CHECK IF NOT ON FORM 1098	2024	2023
POINTS PAID ON LOAN TO BUY, BUILD, OR IMPROVE MAIN HOME			

SELLER FINANCED MORTGAGE		
IDIVIDUAL'S NAME	IDENTIFYING NUMBER	ADDRESS

OTHER PERSON RECEIVING FORM 1098	
FORM 1098 RECIPIENT'S NAME	ADDRESS

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OTHER POINTS					
Enter Below Any Points Paid On A Home Equity Loan (Other Than To Improve Your Main Home), A Loan For A Second Home, Or A Refinanced Mortgage.					
LENDER'S NAME	LOAN OVER	POINTS PAID	DATE OF LOAN	LOAN LENGTH (YEARS)	2023 POINTS DEDUCTED

QUALIFIED MORTGAGE INSURANCE PREMIUMS			
		2024	2023
Premiums Paid In 2024 For Qualified Mortgage Insurance Not From Form 1098 Import			

INVESTMENT INTEREST		
Investment (For Example: Margin Interest, Interest Paid On Loans Used For Property Held For Investment, Etc.)	2024	2023

LIMITED HOME MORTGAGE DEDUCTION			
If The Mortgage Meets The Following Reasons During 2024 Complete The Following:			
*The Principal Amount Of Your Mortgage & Home Equity Debt Is Over $750,000 ($375,000 If Married Filing Separate), Or *You Had Home Debt That Was Not Used To Buy, Build Or Substantially Improve The Home That Secures The Loan			
	Loan 1	Loan 2	Loan 3
1a Interest Paid In 2024			
Points Paid In 2024			
Months Loan Outstanding			
Principal Paid On Loan In 2024			

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LIMITED HOME MORTGAGE DEDUCTION (Cont'd)						
	Buy		Build		Substantially Improve	
	Y	N	Y	N	Y	N
1b Was All Proceeds Of This Loan Used…						
2 Home Debt Origination On Or After December 15, 2017						
Beginning Of Year Balance						
Additional Borrowed In 2024						
	Buy		Build		Substantially Improve	
Enter The Amount Of Debt Not Used To…						

CASH CONTRIBUTIONS			
Name Of Donee Organization	Check If Statement Exists For Gifts $250 or More	2024	2023

	2024
Charitable Miles Driven	
Miles Driven To Deliver Noncash Contributions	
Parking Fees, Tolls & Local Transportation	

Name Of Donee Organization	Check If Statement Exists For Gifts Of $250 Or More	Fair Market Value	Prior Year Fair Market Value

Note: Complete Sections Below **Only** If The **Total** Noncash Contributions Are **More Than $500.**

DESCRIPTION OF DONATED PROPERTY	TYPE**	ADDRESS OF DONEE ORGANIZATION
1.		
2.		
3.		

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CASH CONTRIBUTIONS (Cont'd)				
Complete These Columns **ONLY** For Each Contribution Over $500				
Method Utilized For Fair Market Value*	Date Of Contribution	Date Acquired (Month & Year)	How Acquired***	Your Cost

*Methods Of Determining FMV:		
Appraisal	Capitalization Of Income	Present Value
Average Share	Comparative Sales	Replacement Cost
Catalog	Consignment Shop	Reproduction Cost
Thrift Shop		

**Type Of Donated Property		
Household/Clothing Items	Business Equipment	Intellectual Property
Motor Vehicle, Boat Or Airplane	Business Inventory	Real Property, Conservation Property
Art, Other Than Self-Created	Stock, Publicly Traded	Real Property, Other Conservation
Art, Self-Created	Stock, Other Than Publicly Traded	Other Personal Property
Collectibles	Securities, Other Than Stock	Other Intangible Property

***How Property Was Acquired: Purchase, Gift, Inheritance, Exchange

Note: Complete Sections Below <u>Only</u> If The <u>Total</u> Noncash Contributions Are <u>More Than $500.</u>

DESCRIPTION OF DONATED PROPERTY	TYPE**	ADDRESS OF DONEE ORGANIZATION
1.		
2.		
3.		

"It's Not How Much We Give, But How Much Love We Put Into Giving."
~Mother Theresa~

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DYNAMIC TAX SERVICES

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BUSINESS INCOME & EXPENSES

GENERAL INFORMATION

Is This Activity A Qualified Trade Or Business Under Section 199A? Please Check Which Answer Applies.				YES		NO	
Please Check Which Answer Applies To The Information Listed Below.							
1. Check Ownership...	Taxpayer		Spouse		Joint		
2. Business Name...							
3. Business Street Address...							
4. Principal Business/Profession...							
5. Employer Identification Number...							
6. Business Code **(Prepare Use Only)**							
7. Was This Business Fully Disposed Of In A Fully Taxable Transaction During 2024?				YES		NO	
8. Accounting Method:	Cash		Accrual		Other (Specify)		
9. Method Used To Value Closing Inventory:		Cost		Lower Of Cost Or Market	Other (Explain):		
10. Was There A Change In Determining Quantities, Cost, or Valuations Between Opening/Closing Inventory? (If Yes, Attached An Explanation)...				YES		NO	
11. Did You Materially Participate In The Operation Of This Business During 2024?				YES		NO	
12. Did You Start Or Acquire This Business During 2024?				YES		NO	
13. Did You Make Any Payments In 2024 That Require You To File Forms 1099?				YES		NO	
If Yes, Did You Or Will You File All The Required Forms 1099?				YES		NO	
19. At Risk Determination:							
a. Is All Of The Investment In This Activity At Risk?				YES		NO	
b. Is Some Of The Investment In This Activity Not At Risk?				YES		NO	
20. Did You Have Unallowedn Passive Losses In 2023?				YES		NO	

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BUSINESS INCOME & EXPENSES (Cont'd)		
INCOME	2024	2023
21. Gross Receipt Or Sales		
22. Return & Allowances Plus Other Adjustments		
23. Other Income (Include Federal/State Gas Tax Credit/Refund)		
COST OF GOODS SOLD (IF APPLICABLE)	2024	2023
24. Inventory At Beginning Of Year…		
25. Purchases…		
26. Items Withdrawn For Personal Use…		
27. Cost Of Labor (Do Not Include Your Salary)…		
28. Materials & Supplies…		
29. Other Costs…		
30. Inventory At End Of Year…		
EXPENSES	2024	2023
Business Name:		
31. Advertising…		
32. Car & Truck Expenses…		
33. Commission & Fees…		
34. Contract Labor…		
35. Depletion…		
36. Depreciation & Section 179 Deduction **(Preparer Use Only)**		
37. Employee Benefit Programs:		
a. Employee Health Insurance Premiums…		
b. Other Employee Benefit Programs:		
38. Insurance (Other Than Health)…		
39. Self-Employed Health Insurance Attributable To This Business…		
40. Interest:		
a. Mortgage Paid To Banks Not Reported To You On Form 1098…		
b. Other…		
41. Legal & Professional Services…		
42. Office Expenses…		
43. Pension & Profit-Sharing Plans…		
44. Rent Or Lease:		
a. Machinery & Equipment		

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BUSINESS INCOME & EXPENSES (Cont'd)		
INCOME	2024	2023
b. Other Business Property…		
45. Repairs & Maintenance…		
46. Supplies (Not Included In Cost Of Goods Sold)….		
47. Taxes & Licenses Not Reported To You On Form 1098…		
48. Travel & Meals		
a. Travel…		
b. Meals Subject To 50% Limit…		
c. Meals Subject To 80% Limit…		
d. Meals Not Subject To Limit…		
49. Utilities…		
50. Gross Wages…		
51. Other Expenses:		
a.		
b.		
c.		
52. Expenses For Business Use Of Your Home **(Preparer Use Only)**		
53. Qualified Pension Plan Start-Up Costs…		

BASIC PROPERTY INFORMATION

RENT & ROYALTY INCOME & EXPENSES						
Property Description:						
Property Type:	If Type Is Other, Enter A Description:					
Location (Street Address):						
If A Foreign Address:						
Is this Activity A Qualified Trade Or Business Under Section 199A?	YES		NO			
1. Check Property Owner…	Taxpayer		Spouse		Joint	
2. a. Did You Make Any Payments That Would Require You To File Form(s) 1099?	YES		NO			
b. If **Yes**, Did You Or Will You File All Required Form(s) 1099?	YES		NO			
3. a. Enter The Ownership Percentage (If Not 100%)						
b. If Not 100%, Are You Reporting 100% Of The Income & Expenses?	YES		NO			
4. Is This A Rental Property? (If **YES**, Answer Questions 5 through 11; If **NO**, Skip To Question 12.)	YES		NO			

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BASIC PROPERTY INFORMATION (Cont'd)				
RENT & ROYALTY INCOME & EXPENSES				
5. Did You Have Personal Use Of This Property Or Rent It For Part Of The Year At Less Than Fair Rental Value?	YES		NO	
6. For All Rental Properties, **Enter The Number Of Days** During 2024 That:				
a. The Property Was Rented At Fair Rental Value…	YES		NO	
b. The Property Was Used Personally Or Rented At Less Than Fair Rental Value…	YES		NO	
c. You Owned The Property, If Not The Entire Year…	YES		NO	
7. a. Does This Rental Have Multiple Living Units & You Live In One Of The Units	YES		NO	
b. If **Yes**, Enter Percentage Of Rental Use…				%
8. Did You Actively Participated In This Property's Management During 2024?	YES		NO	
9 Did You Materially Participate In This Property's Management During 2024?	YES		NO	
10. Do You Want To Treat This Property As Non-Passive?	YES		NO	
11. Did This Property Have Unallowed Passive Losses In 2023?	YES		NO	
12. Did You Dispose Of This Property In A Fully Taxable Transaction?	YES		NO	
13. Check this Box If Some Of This Investment Was **NOT** At-Risk	**AT-RISK**			
14. a. Treat All MACRS Assets For This Activity As Qualified Indian Reservation Property?	YES		NO	

INCOME	2024	2023
15. Rents Or Royalties Received…		

*Property Types:	1. Single-Family Residence 2. Multi-Family Residence 3. Vacation/Short-Term Rental 4. Commercial	5. Land 6. Royalties 7. Self-Rental 8. Other

EXPENSES	2024	2023
Property Location…		
16. Advertising …		
17. a. Automobile …		
b. Travel…		
18. Cleaning & Maintenance…		
19. Commission…		
20. a. Mortgage Insurance Premiums Qualified…		
b. Other Insurance…		
21. Legal & Professional Fees		

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BASIC PROPERTY INFORMATION (Cont'd)		
EXPENSES (Cont'd)	2024	2023
22. Management Fee(s)…		
23. a. Mortgage Interest Paid To Bank(s) Qualified…		
b. Mortgage Interest Paid To Bank(s) Other		
24. Other Interest…		
25. Repairs…		
26. Supplies…		
27. a. Real Estate Taxes…		
b. Other Taxes…		
28. Utilities…		
29. Other Expenses:		
a.		
b.		
c.		
30. a. Depreciation & Section 179 Deduction **(Preparer Use Only)**…		
b. Depletion **(Preparer Use Only)**…		

GENERAL INFORMATION		
	Taxpayer	Spouse
1. Enter Your State Of Residence…		
2. Check The Appropriate Box If:		
a. Full Year Resident…		
b. Part Year Resident…		
c. Part Year Resident… Date Of Entry:	Date Of Exit:	
d. Nonresident…		
3. Resident Locality:		
4. County:	School District:	School District Number:
5. Check If Disabled…	Taxpayer	Spouse

STATE CREDITS		
6. DESCRIPTION/TYPE OF CREDIT (For Example, Solar Energy, Carpool)	**CODE**	**AMOUNT**
a.		
b.		
c.		

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VOLUNTARY STATE CONTRIBUTIONS		
7. DESCRIPTION/TYPE OF CREDIT (For Example, Solar Energy, Carpool)	CODE	AMOUNT
a.		
b.		
c.		

MISCELLANEOUS QUESTIONS				
8. Did You File A State Return For 2023?	YES		NO	
9. Do You Want State Forms & Instructions Sent To You Next Year?	YES		NO	
10. Do You Want Any Applicable Penalty & Interest Calculated & Added To The Return?	YES		NO	
11. How Do You Want Your State Refund (If Any) Applied?	YES		NO	

a. Refunded		b. Apply To 2025 Estimates		c. Apply To 2025 Taxes	

12. Additional State Information: ______________________

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PREPARER INFORMATION: The last five lines below will print the firm name, preparer name, firm address, firm telephone number, firm fax number, and firm or preparer email address based on the boxes checked below. See help for additional information.

Firm's Name:	Dynamic Tax Services LLC
Preparer's Name:	Bernadette Fisher
Firm's Address:	8297 Champions Gate, 632, Champions Gate, Florida 33896
Firm's Phone Number:	(386) 248.5467
Firm's Email Address:	TheDynamicTaxServices@Gmail.Com

LET's KEEP IN MIND, MONEY GROWS ON THE TREE OF PERSISTENCE.