The Bridge
Certified Public Accountants

Individual Tax Organizer

2024

1011 Arlington Blvd. T4, Arlington, VA 22209 *Tel.: (703) 942-9476* *email: nega.teshome@thebridgecpas.com*

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INDIVIDUAL TAX ORGANIZER

Enclosed is an organizer that we provide to tax clients to assist in gathering the information needed to prepare your current year tax returns.

Your individual income tax returns are due on **April 15, 2025**. Tax returns are prepared in the order received**. We will not start working on your return until all information required has been received**. In order to guarantee the timely filing of your return, tax organizers and supporting documents must be received no later than **March 31, 2025**.

If an extension of time to file your tax return is required, any tax that may be due must be paid with the extension by April 15, 2025. Amounts not paid by the filing deadline may be subject to late payment penalties and interest.

The work performed in connection with the preparation of your federal and state income tax returns is intended to be in compliance with the requirements issued by the various taxing authorities. Because tax laws are not always clear, honest differences of opinions may arise between our interpretation of laws and that of the various taxing authorities. We will assist you in resolving these differences in your favor whenever possible.

All tax returns are subject to review and acceptance by the various taxing authorities. In the event of an examination or other taxing authority contact, The Bridge CPAs can assist you with responding to the notice or represent your position before the taxing authority. However, there is an additional fee for this service that is not included in your tax preparation fees.

Please review all completed tax returns carefully. As a tax preparer, we have a responsibility to both the various taxing authorities with whom we file tax returns as well as to our clients. Clients will remain liable for the contents of tax returns prepared by The Bridge CPAs, LLC with data provided by that client.

All tax return preparation fees must be paid before the full tax return will be released to clients and/or electronically filed. Tax returns will be electronically filed only after payment and the signed e-file authorization forms are received.

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Dear client,

Enclosed is your Tax Organizer for tax year 2024.

Your Organizer contains several sections that include common expenses and deductions that many taxpayers overlook. Please review these sections carefully. Depending upon your tax bracket, you may save as much as $37 for each $100 in deductible expenses you find in your 2024 records.

If our firm prepared your return last year, your prior year amounts are included in the Prior Year Amount column of your Organizer. Use this information to help you remember the types of income and deductions you reported last year.

To complete the Organizer, enter all relevant information in the designated areas on each page. Please add any notes or questions that will help us prepare a complete and accurate return for you and to plan with you how to manage your tax situation in future years.

If you answer 'Yes' to any of the General Business and Investment questions, please provide detailed information with your answer.

Please schedule your appointment for:

Day:

Date:

Time:

When you arrive for your appointment, please bring your Organizer and any of the following that apply to your tax situation:

- Last year's tax return (if not in our possession)
- Original Form(s) W-2
- Schedule(s) K-1 from partnerships, S-corporations, estates or trusts
- Information about contributions to a pension or other retirement plan if this is the first year you received income from the plan
- Form(s) 1099 or statements reporting dividend, interest, retirement or other income
- Broker statements providing details of capital gains transactions
- Form(s) 1098 and copies of real estate tax bills, etc.
- Legal documents pertaining to the sale or purchase of real property If you have any questions before your scheduled appointment, please give us a call.

Sincerely,

The Bridge CPAs, LLC

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January 14, 2025

Dear client,

Thank you for choosing our firm to prepare your income tax returns for tax year 2024. This letter confirms the services we will provide.

We will prepare your federal and state returns for tax year 2024 based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so that we can prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions for tax year 2024, and to respond to our inquiries in a timely manner so that we are able to accurately complete your returns by the appropriate due dates.

You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions, and purchase and sales information for assets.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have substantiation for your deductions. Filing your returns by the due dates is your responsibility.

If your returns are later selected for review or audit by taxing authorities, we will be glad to assist or represent you if you desire. Our fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority review.

Our fees for preparation of your returns are based upon our standard billing rates plus out-of-pocket expenses. Our invoices are due and payable upon presentation.

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your tax returns, please sign the enclosed copy in the space indicated and return it to us.

Thank you again for choosing our firm to prepare your 2024 tax return. We appreciate your business.

Sincerely,

____

The Bridge CPAs, LLC

Accepted by:

____ Date ________________

____ Date ________________

General Information

	Taxpayer	Spouse
First Name		
Middle Initial		
Last Name		
Suffix		
Social Security Number		
Date of Birth		
Date of Death		

Check ("X") which phone number to list on return.

	Taxpayer	Spouse
Home Phone		
Work Phone		
Cell Phone		
Fax Number		
Legally Blind		
Totally Disabled		
Claimed as a Dependent		
Presidential Election Fund ($3)		
Occupation		
E-mail address		
State of Residence as of 12/31		
County of Residence as of 12/31		
School District as of 12/31		
Sales tax rate of locality in 2024	%	%
If Part Year, Period of Residency	to	to

Additional information is being requested this filing season in an effort to combat stolen-identity tax fraud. Please provide the requested information from the driver's license or state-issued identification card. Providing the information could help process state returns faster.

	Taxpayer	Spouse
ID type	☐ Driver's license OR ☐ State Issued ID	☐ Driver's license OR ☐ State Issued ID
ID number		
ID issuing state		
ID issue date		
ID expiration date		

Filing Status

Status on 2023 return : ☐

Status as of 12/31/2024 :

Enter ("X") in the box

- ☐ **1** Single
- ☐ **2** Married filing joint
- ☐ **3** Married filing separately
  (Enter spouse's name and SSN above)
- ☐ **4** Head of Household Non-dependent name: ____
  Non-dependent SSN: ____
- ☐ **5** Qualifying surviving spouse (QSS) Year spouse died

Taxpayer's Address

Street ____ Apt/Suite : ____

City ____ State ____ Zip Code ____

If address is in a foreign country, enter that country ____

Foreign province/county ____ Foreign postal code ____

If a bona fide resident of a U.S. territory, enter territory

Preparer's Information

Preparer's name Nega H Teshome, CPA

Firm's name The Bridge CPAs, LLC

Street 1011 Arlington Blvd T4

City Arlington State VA Zip Code 22209

Attestation and Signature:

To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Sign ____ Date ____

here ____ Date ____

Name ______________________ SSN ______________________

Questions

Yes	No		Personal Information
☐	☐	1	Did any births, adoptions, marriages, divorces, or deaths occur in your family since last year?
☐	☐	2	Did you purchase or sell your principal residence or did your address change?
☐	☐	3	Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return?
☐	☐	4	Were you in a Registered Domestic Partnership, civil union or same-sex marriage during 2024?
☐	☐	5	Were either you or your spouse in the military or National Guard?
☐	☐	6	Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax correspondence?
☐	☐	7	Have you or your spouse been an identity theft victim and given an identity theft protection six digit PIN by the IRS?

Yes	No		Dependents
☐	☐	1	Are there any changes in your dependents from last year?
☐	☐	2	Did you have any children under 19 (or 24 if a full time student) who received more than $1,250 in investment income?
☐	☐	3	Did you pay education expenses for your dependent children?
☐	☐	4	Did anyone in your family receive a scholarship of any kind during 2024?
☐	☐	5	Did you pay any dependent care expenses for a child or a parent?
☐	☐	6	Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent?
☐	☐	7	Are all of your dependents either US residents or citizens?

Yes	No		Health Care Coverage
☐	☐	1	Did you or a member of your family have minimum essential coverage in 2024? (The entity that provided the coverage may have sent you a Form 1095-A, 1095-B, or 1095-C, that lists individuals in your family who were enrolled in minimum essential coverage and shows their months of coverage.)

Yes	No		Income (In 2024, did you or your spouse have any of the following?)
☐	☐	1	Wages? (include form(s) W-2)
☐	☐	2	Non-employee compensation? (include form(s) 1099-NEC)
☐	☐	3	Miscellaneous Income? (include form(s) 1099-MISC)
☐	☐	4	Interest income? (include form(s) 1099-INT)
☐	☐	5	Dividend income? (include form(s) 1099-DIV)
☐	☐	6	Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account?
☐	☐	7	Gambling income? (include form(s) W-2G). Be sure to include any gambling expenses.
☐	☐	8	Social security or Railroad Retirement benefits? (include form(s) SSA-1099 & RRB-1099)
☐	☐	9	Did you receive a state or local refund, or a refund of any other deduction you itemized in a prior year? (attach 1099-G)
☐	☐	10	Disability income? (include form(s) W-2 or 1099)
☐	☐	11	Unemployment compensation? (include form(s) 1099-G)
☐	☐	12	Alimony?
☐	☐	13	Did you receive tip income NOT reported to your employer?
☐	☐	14	Did you receive payments from a Long-Term Care insurance contract?
☐	☐	15	Did you barter your services for goods or services from someone else?
☐	☐	16	Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp?
☐	☐	17	Did you receive employer-provided adoption benefits for a previous year?
☐	☐	18	Did you cash in any U.S. savings bonds?
☐	☐	19	Did you make a loan to someone at an interest rate below market rate?
☐	☐	20	Did you receive a housing allowance for ministerial services you provided?
☐	☐	21	Did you receive any income not reported in this Organizer?
☐	☐	22	Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)?
☐	☐	23	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?

Yes	No		Foreign Reporting
☐	☐	1	Did you have an interest in or signature authority over a financial account in a foreign country?
☐	☐	2	Were you the grantor of or transferor to a foreign trust?
☐	☐	3	Did you receive income from a foreign source or pay taxes to a foreign government?

Yes	No		Retirement & Other Plans
☐	☐	1	Did you receive any distributions from a retirement plan? (Include form(s) 1099-R)
☐	☐	2	Did you rollover a retirement plan distribution into another plan?
☐	☐	3	Did you convert a traditional IRA to a Roth IRA?
☐	☐	4	Did you make a contribution to a retirement plan? (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
☐	☐	5	Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account?
☐	☐	6	Did you receive a distribution from an HSA, Archer MSA or Medicare Advantage MSA (Include form(s) 1099-SA)
☐	☐	7	Did you make any contributions to an HSA (Health Savings Account) in 2024?
☐	☐	8	Did you receive a qualified disaster distribution in 2024?
☐	☐	9	Did you receive an early distribution for a qualified birth or adoption distribution?

Yes	No		Purchases, Sales, Gains and Losses
☐	☐	1	Did you exchange any securities or investments for something other than cash?
☐	☐	2	Do you have any short sales, commodity sales, or straddles?
☐	☐	3	Did you receive Form 2439?
☐	☐	4	Did you buy or sell any bonds?
☐	☐	5	Did you receive stock from a stock bonus plan with your employer?
☐	☐	6	Did you sell any other personal assets at a gain?
☐	☐	7	Did you sell any real estate (other than your home) during the year?
☐	☐	8	Did you sell any assets using the installment method?
☐	☐	9	Did you receive proceeds from a prior year installment sale?
☐	☐	10	Did you purchase a rental property?
☐	☐	11	Did you exchange any property for other property?
☐	☐	12	Did you incur a loss because of damaged or stolen property?
☐	☐	13	Did you purchase a new vehicle, aircraft or boat?
☐	☐	14	Did any security become worthless during 2024?
☐	☐	15	Did any debts become uncollectible during 2024?
☐	☐	16	Did you puchase any items acquired out of state, online or by mail order that did not include sales tax?

Yes	No		Business and Rental Property Income & Deductions
☐	☐	1	If you own rental property, do you qualify as a Real Estate Professional?
☐	☐	2	Did you start or acquire a new business?
☐	☐	3	Did you sell any part of an existing business, or sell business assets?
☐	☐	4	Did you cease operating any business or rental property?
☐	☐	5	Did you remove any of your business assets for personal use?
☐	☐	6	Did you use part of your home for business purposes?
☐	☐	7	Did you make any contributions to a Keogh or a self-employed SEP plan for 2024?
☐	☐	8	Do you pay for any health or long term care insurance through your business?
☐	☐	9	If you or your spouse are self-employed, are either of you covered under an employer's health plan?
☐	☐	10	Did you purchase any furniture or equipment for your business?
☐	☐	11	Did you make any improvements to your rental properties?
☐	☐	12	Did you receive income from raising animals or crops?

Yes	No		Other Deductions
☐	☐	1	Did you use your car on the job (other than to and from work)?
☐	☐	2	Did you work out of town for part of the year?
☐	☐	3	Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?
☐	☐	4	Did you incur any travel and entertainment expenses for business purposes?
☐	☐	5	Did you pay expenses for the care of your child or other dependent so you could work?
☐	☐	6	Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024?
☐	☐	7	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024?
☐	☐	8	Did you contribute less than an entire interest in any property to charity?
☐	☐	9	Did you refinance a mortgage or take out a home equity loan during 2024?
☐	☐	10	Did you incur moving expenses during the year due to a military order and incident to a permanent change in station?
☐	☐	11	Did you or your spouse pay any educational expenses for yourselves?
☐	☐	12	Did you pay any student loan interest?
☐	☐	13	Did you make any federal or state estimated payments?
☐	☐	14	Did you pay alimony?
☐	☐	15	Did you donate non-cash donations?
☐	☐	16	Did you donate a vehicle?

Yes	No		Miscellaneous
☐	☐	1	Did you make gifts of more than $17,000 to any one person?
☐	☐	2	Did you engage the service of any household employees?
☐	☐	3	Did your bank account information change within the last twelve months?
☐	☐	4	Do you want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	5	Does your spouse want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	6	Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2024?
☐	☐	7	Did you claim a First-time Homebuyer Credit for a home purchased in 2008?
☐	☐	8	Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit?

Yes	No		**Return preparation and filing**
☐	☐	1	Do you want to e-file your return?
		2	If you are due a refund, how do you want to receive it?

☐ Check sent to you in the mail ☐ Other quick refund via a bank product

☐ Apply to next year's estimates ☐

☐ Direct deposit (please provide voided blank check) Type of account: ☐ Checking ☐ Savings

If you owe taxes, how do you want to pay them? ☐

☐ Paper check sent with my return ☐ Credit card ☐ Installment Agreement

☐ Direct debit (please provide a voided blank check) Type of account: ☐ Checking ☐ Savings

Yes	No		
☐	☐	3	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:

Designee's name ______________________ Phone Number ______________ Personal identification Number (5 digit PIN) ________

Name ______________________ SSN ______________________

Comments