PAGANO & ASSOCIATES
ACCOUNTANTS AND ADVISORS

Client Information

To help us prepare and file a complete and accurate return for tax year 2025, please fill-out this first page.

For New / Existing Clients:

Taxpayer Name: ____________________________SSN_____________Birth: ____ / ____ / ____

Spouse Name: ______________________________SSN_____________Birth: ____ / ____ / ____

Address: ____

Email: ____

Phone: ____

Dependent Name: ______________________________ SSN: ____________ Birth: ___ / ___ / ___

Dependent Name: ______________________________ SSN: ____________ Birth: ___ / ___ / ___

Dependent Name: ______________________________ SSN: ____________ Birth: ___ / ___ / ___

Dependent Name: ______________________________ SSN: ____________ Birth: ___ / ___ / ___

Filing status: ☐ Single ☐ Married filing jointly ☐ Married filing separately (MFS)
☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)

Taxpayer
Driver's License: _________ State: ______ Issue: _______ Expiration: _____SSN: _____________

Spouse
Driver's License: _________ State: ______ Issue: _______ Expiration: _____SSN: _____________

NEW CLIENTS PLEASE PROVIDE US WITH YOUR PRIOR 2 YEARS TAX RETURNS, DRIVERS LICENSE PHOTOS AND SOCIAL SECURITY CARDS.

Bank Account Information for Direct Deposit or Direct Debit of Tax Returns

For Direct Deposit:
Account Number: ___________ Routing Number: ____________ Bank Name: _______________

For Direct Debit:
Account Number: ___________ Routing Number: ____________ Bank Name: _______________

Any Changes From Previous Year or Notes for the Preparer (please describe):

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Tax Organizer - 2025

Please collect and provide us with any of the following forms and information you have received for your 2025 income tax return:

- [ ] **W-2** for wages
- [ ] **W-2G** for gambling
- [ ] **1099-Int** for interest
- [ ] **1099-DIV** for dividends
- [ ] **1099-B** Brokerage
- [ ] **1099-DA** Digital Assets
- [ ] **SSA-1099** Social Security
- [ ] **1099-NEC** for income
- [ ] **1099-MISC** for income
- [ ] **1099-K** for online payment and money transactions
- [ ] **1099-R** for retirement
- [ ] **1099-G** for refunds & unemployment
- [ ] **1098** for mortgages
- [ ] **1098-T** for tuition
- [ ] **1098-E** for student loan interest
- [ ] **1099-SA** for HSA's
- [ ] **1095-A** Health Insurance Marketplace
- [ ] **K-1** forms from investments in S corporations or partnerships
- [ ] **Form 5498** for IRA values
- [ ] **IRA** and **Roth IRA** contributions for 2025
- [ ] Child care costs, and the name, address, amount, and ID # of the recipient
- [ ] 529 plan contributions and name. amount and social security number of recipient
- [ ] Charitable donations-total amounts and recipients
- [ ] Property tax paid on your home, property, or cars
- [ ] Medical expenses paid out of pocket
- [ ] Estimated tax payments and dates

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