

BA TAX PROS
2412 W DETROIT ST
BROKEN ARROW, OK 74012
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2025
TAX ORGANIZER

Taxpayer Information			Spouse 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	Ext ...		Work phone.....		Ext ...
Cell phone			Cell phone		
E-mail address.....			E-mail address.....		
Date of birth			Date of birth		
Address			Apartment number.....		
City			State.....		
Home phone.....			Fax number		
Dependent Information					
First name	MI	Social Security Number	Date of Birth	Months Lived with Taxpayer	Child Care Expense
Last name	Suffix	Relationship			
Child and Dependent Care Provider Expenses					
Name	Address		ID Number	Amount Paid	
Education Tuition and Fees					
Attach all Form 1098-Ts and a list of your qualified education expenses.					
Student Loan Interest Paid					
Enter total 2025 qualified student loan interest.....					

1040 Tax Drop-Off Checklist – Tax Year: _____

Item	Changed?	Notes (If Yes)
Address	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____ City _____ Zip _____
Phone / Email	<input type="checkbox"/> Yes <input type="checkbox"/> No	Phone: _____ Email: _____
Bank Info for Refund	<input type="checkbox"/> Yes <input type="checkbox"/> No	Routing #: _____ Acct #: _____
Driver's License Info	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse Provide Copy if updated
Dependents	<input type="checkbox"/> Yes <input type="checkbox"/> No	Provide SSN/DOB/Relation _____
Marital Status	<input type="checkbox"/> Yes <input type="checkbox"/> No	Provide details of change _____
Any crypto activity last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Provide 1099-B or similar document	
Health Exchange (1095-A)?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Provide 1095-A	
Sold/refinanced/abandoned a home?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Provide Closing Statement for home sold	
College tuition for anyone in household?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Provide 1098-T or similar document	
Child needs a tax return? (\$200–\$350)	<input type="checkbox"/> Yes <input type="checkbox"/> No – Provide name, income sources, & relevant info	
Solo-K / SEP / SIMPLE IRA / 401(k)?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Company/Amount: _____ / _____	
Foreign bank account ownership?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Total balances ever \$10K+? _____	
Did all dependents on your return live with you at least $\frac{1}{2}$ of the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No – If NO, who doesn't meet this qualification?	
Estimates: Fed/State estimated payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Provide dates and amounts of payments	

 Include These Documents when you turn in

Signed Engagement Agreement Prior Year Return (if we didn't prepare it) All W-2s, 1099s, 1098s, and other tax doc

NOTES:
