FOOTHILLS CPAs LLC
150 Executive Center Drive
Suite 223, Greenville, South Carolina 29615.

2025 TAX ORGANIZER

Please review the engagement letter at the end of this organizer. After you finish, initial below to confirm you have read and accept the terms of our engagement
Client initials: ______ Client Initials: ______

The filing deadline for your income tax return is **April 15, 2026**. Your completed tax organizer needs to be received no later than **March 16, 2026**.

If an extension of time is required, any tax due must be paid with that extension. Any taxes not paid by the filing deadline may be subject to late-payment penalties and interest.

The Internal Revenue Service (IRS) matches information returns/forms with amounts reported on tax returns. A negligence penalty may be assessed when income is underreported or when deductions are overstated. Accordingly, all information returns reflecting amounts reported to the IRS are also mailed or delivered to taxpayers in an envelope clearly marked "**IMPORTANT TAX DOCUMENTS ENCLOSED**" and should be submitted with this organizer.

PERSONAL INFORMATION		
Taxpayer Name:		
Phone Number:	**Email Address:**	
Spouse Name:		
Spouse Phone Number:	**Spouse Email Address:**	
Did you move in 2025? ☐ Yes ☐ No If yes, please provide new address and dates of residence:		
Street Address:		
City:	State:	Zip:
For direct deposit of your refund, this information must be confirmed **every year**. Please provide:		
Bank Name:	Routing Number:	Account Number:

TAX RETURN			
Please list marital status as of December 31, 2025: If you're unsure, guidance can be found here: https://www.irs.gov/newsroom/correct-filing-status			
Filing Status (choose one):		Is Taxpayer or Spouse Blind? (choose one):	
☐	Single	☐	Yes – Taxpayer
☐	Married Filing Jointly	☐	Yes – Spouse
☐	Married Filing Separately	☐	Yes – Both
☐	Head of Household	☐	No
☐	Qualifying Widow(er)		

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ESTIMATED PAYMENTS

Did you make any estimated Payments in 2025? If yes, please detail the authority and date of payment.

Federal	**Date**	**Amount**	**State**	**Date**	**Amount**

DEPENDENT(S)

Full Name	SSN	Relationship	Date of Birth	# Months Resided in Your Home

DEPENDENT CARE

Did you incur child/dependent care costs during 2025? If so, please include the following for each provider

- Only expenses up to $3,000 per child are eligible for the credit
- If you have a dependent care FSA **DO NOT** skip this section

Full Name	Full Address	EIN/SSN	Amount Paid in 2025	Name of Child care was for

HOUSEHOLD

Please answer the following questions and submit details for any answered “Yes.”	Yes	No
Did any births, adoptions, marriages, divorces or deaths occur in your family last year? If yes, provide dates/details as appropriate and remember to include details above for any new dependents.	☐	☐
Did you pay any household employee over age 18 wages of $2,100 or more? If yes, provide a copy of form W-2 issued to each household employee.	☐	☐

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Please answer the following questions and submit details for any answered "Yes."		Yes	No
Did you and your dependents have health care covered for the full year? If not, please list the months without coverage below.		☐	☐
Did you purchase a new US-assembled passenger vehicle in 2025? If so, please detail interest paid.		☐	☐
Did you, or do you plan to contribute money before April 15, 2026 to a health savings account (HSA) for the last calendar year? If yes, please include dollar amount contributes as of 12/31 or 5498-SA in your uploads. Please also detail separately any contributions you plan to make by 4/15/26.	5498-SA ☐	☐	☐
Did you have a **distribution** from a health savings account (HSA) for the last calendar year? If yes, please include the dollar amount distributed below and include your 1099-SA Form in your uploads.	1099-SA ☐	☐	☐
If you had **distributions** from a health savings account (HSA) were all amounts used for qualified medical expenses? If not, please note below any amounts used for purposes other than qualified medical expenses.		☐	☐
Did you have significant medical expenses to deduct in 2025? Please detail using the Medical & Dental expense worksheet (https://www.foothillscpas.com/forms) Note: The IRS only allows deduction of medical expenses to the extent that they exceed 7.5% of your Adjusted Gross Income (AGI). For a family that has an AGI of $100,000, you would only start to be able to deduct expenses that exceed $7,500.		☐	☐
Did you buy or sell a home during 2025? If so, please include your Closing Disclosure Form or ALTA with your uploads. For home sales please also include Form 1099-S if received during closing. Please also detail • The cost basis of the home sold (purchase price + closing costs + improvements) • Whether you had rental or home office usage of the home during ownership	1099-S (home Sale) ☐	☐	☐
Did you make any energy-efficient improvements (remodel or new construction) to your home? Ex. Solar, wind, geothermal, HVAC systems, windows or doors If so, please include cost and details of improvements below or with your uploads.		☐	☐

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Please answer the following questions and submit details for any answered "Yes."		Yes	No
Did you refinance your home or do you have a HELOC? If so, please include both 1098's with your document upload.	1098 ☐	☐	☐

INCOME			
Please answer the following questions and submit details for any answered "Yes."		Yes	No
Did you have W-2 or wage income?	W-2 ☐	☐	☐
Did you receive a **distribution** from a retirement plan (401(k), IRA, etc.)?	1099-R ☐	☐	☐
Did you buy or sell stocks, bonds, mutual funds or other investments?	1099-B/INT/DIV ☐	☐	☐
Did you mine, buy, or sell bitcoins or other virtual currencies? If so, please include details of mining, purchase and sale transactions (including purchases made with digital currencies) with your uploads. We recommend https://www.cointracker.io/		☐	☐
Do you own or have a controlling interest in foreign (outside of the US) financial institutions, businesses, investment funds, bank accounts or assets greater than $10,000 in aggregate? If so, please complete the Foreign account and asset reporting worksheet: (https://www.foothillscpas.com/forms)		☐	☐
Did you receive a refund for state or local income taxes paid in 2025?	1099-G ☐	☐	☐

DEDUCTIONS			
Please answer the following questions and submit details for any answered "Yes."		Yes	No
Did you donate money, household goods, clothes, cars, or stock? Please use the **Charitable contributions worksheet** on our webpage to detail your donations. Please also use this worksheet for non-cash donations that exceed $500 in total value (https://www.foothillscpas.com/forms)	Charitable Contribution Worksheet ☐	☐	☐
Did you make contributions to a Traditional or Roth IRA account for 2025?	5498 ☐	☐	☐

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If so, please detail the type of IRA account and total amount contributed for each taxpayer. Please also include any contributions you plan to make before April 15, 2025.			
EDUCATION			
Please answer the following questions and submit details for any answered "Yes."		Yes	No
Did you incur any tuition or continuing education expenses?	1098-T ☐	☐	☐

Did you make contributions to a 529 plan? If so, please include the following details for each account:

Account Owner	Beneficiary Name	Total Amount of Contributions for 2025	State of 529 Plan

PLEASE LIST ANY QUESTIONS OR CONCERNS YOU MIGHT HAVE:

Please detail any significant financial changes or events you're expecting in 2026:

Please answer the following questions and submit details for any answered "Yes."	Yes	No
Are you still waiting for any K-1? If so, please note each below:	☐	☐

Name of Company	Expected date of receipt for K-1

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RENTAL INCOME		
Please answer the following questions and submit details for any answered "Yes."	Yes	No
Do you have income or expenses to report for a rental property? If so, please include a summary of rental property income and expenses. If helpful, please use our Rental property worksheet - (https://www.foothillscpas.com/forms)	☐	☐

For each rental property list:

Full Address	# days rented	# days personal use	Entire Home?		Square Footage	
			Yes	No	Total	Rental Portion
			☐	☐		
			☐	☐		
			☐	☐		
			☐	☐		
			☐	☐		

FARM INCOME		
Please answer the following questions and submit details for any answered "Yes."	Yes	No
Do you have income or expenses to report for a farm? If so, please include a summary of farm income and expenses. If helpful please use our Business income and expense worksheet - (https://www.foothillscpas.com/forms)	☐	☐

BUSINESS INCOME			
Please answer the following questions and submit details for any answered "Yes."		Yes	No
Do you have income or expenses to report for a Sole Proprietorship or Sole Member LLC? If so, please include a summary of business/ self-employment income and expenses. If helpful please use our Business income and expense worksheet – (https://www.foothillscpas.com/forms)		☐	☐
Are you a member of any pass-through entities? If so, please include a K-1 from each of your pass-through entities (LLCs, S Corporations, Partnerships, Trusts, and Estates).		☐	☐
Did you have Self-Employed Health Insurance? If so, please upload a copy of your 1095-A.	1095-A ☐	☐	☐

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Did you make contributions to a Traditional, Roth, Simple or Self -employed pension (SEP) IRA account for 2025? If so, please detail the type of IRA account and total amount contributed for each taxpayer. Please also include any contributions you plan to make before April 15, 2026.	☐	☐

HOME OFFICE DEDUCTION (self-employed only)

Please answer the following questions and submit details for any answered "Yes."	Yes	No
Do you have expenses to report for use of a home office? If so, please include a summary of expenses. If helpful, please use our Home office worksheet - (https://www.foothillscpas.com/forms)	☐	☐

For business use of home, please include:

Full Address	Square footage of office	Square footage of home

BUSINESS USE OF VEHICLE DEDUCTION (self-employed only)

If your personal vehicle was used for business purposes, please provide the following:

Year/Make/Model of Vehicle	Total miles driven in 2025 (reasonable estimates are acceptable)	Business Miles driven in 2025 (reasonable estimates are acceptable)

Do you expect any significant changes to business income or expenses?
If so, please document HERE:

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January 2026

Dear Clients:

Happy New Year! We hope this letter finds you well and that you enjoyed a wonderful holiday season. This letter serves to orient new clients to our tax season process and to provide updates for our returning clients. Please keep a copy of this letter to reference as you gather your documents for tax filing. It will help make sure this year's tax season progresses smoothly for everyone.

Contacting Us & Meeting Availability

Our central point of contact for tax season will be the Foothills Admin address (**admin@foothillscpas.com**). **All questions regarding meetings, tax document submission, fees, return status, and invoice payment should be sent to this address. Even if you typically contact Rajani or other team members directly outside of tax season, please use the admin e-mail address during tax season as it will help us ensure timely communication with you.**

All meetings will continue to be held virtually. You can view meeting availability and schedule a meeting online at **https://calendly.com/foothillscpas**. We have found that the most productive tax season meetings are those where we've substantially completed your return prior to the meeting and are able to review the return with you through a web conference. These meetings help to make sure we've prepared the return correctly and are not missing any opportunities for deductions as well as provide you with a better understanding of the return and any tax planning steps that can be implemented for the current or subsequent year. Accordingly, we encourage clients who would like to schedule review meetings to schedule at minimum two weeks out from when you anticipate providing your documents to us.

Dates & Document Submission

Individual returns:
Document submission deadline: March 16, 2026
Tax filing deadline: April 15, 2026

Business returns (Partnerships and S Corporations):
Document submission deadline: February 16, 2026
Tax filing deadline: March 16, 2026

Trust and C Corporations:
Document submission deadline: March 16, 2026
Tax filing deadline: April 15, 2026

Please be sure to submit your documents to us by the noted document submission deadline. If documents are received after the deadline, we will file the appropriate extensions and communicate next steps as we will not be

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able to guarantee that your returns will be submitted by the tax filing deadline. Our document submission deadlines help to ensure adequate processing time to complete, review, and submit returns in time to meet the tax filing deadlines.

You can begin uploading documents to your portal as soon as you're ready; however, we ask that you hold off on notifying us that you have submitted documents until you have uploaded **all** documents including **a completed tax organizer**. This will help us work more efficiently on your return.

We strongly encourage usage of your **electronic portal** over email or traditional mail for questions, document submission, return delivery, and communication about your return. The portal helps us keep your information secure and organized by maintaining one central place for communication. Box has message technology that allows you to communicate directly with Admin, your client steward, or any other team members. The comment features work by typing '@' and then the name of the person you want to contact within any file included in your Box portal.

Document Submission Options

Electronically:
Box: https://foothillscpas.app.box.com/ Returning and new clients should have access to Box already. If you don't have an invitation/account, please contact us by phone or email to admin@foothillscpas.com. Box is an industry leader in secure online file exchange and storage. It uses a simple folder-like structure to store and transfer documents. Once you have finished uploading your documents, please be sure to send us an email or use the comment feature within Box to send a note to Foothills Admin.

Postal Service/ FedEX / UPS: We encourage you to obtain a tracking number when you send copies of your documents by mail or delivery service to our Greenville, SC office.

A copy of your completed return will be sent electronically through the Box portal. We will only mail copies upon request.

Please note we will not be holing and returning original documents. If you decide to mail us your documents, please be sure that they are copies.

1099 and W-2 Reporting

We will be offering 1099-MISC or W-2 form filing services for our clients. This offering begins at $100 for up to 5 forms to be filed. Additional forms may be added in at the rate of $50 per 5 forms. W-9 forms, W-4 forms and other application information for 1099 and W-2 form filings should be provided by the close of business Monday, January 26th in order to allow adequate time to prepare and file your forms in time for deadline Monday, February 2nd. Please contact us at admin@foothillscpas.com to request 1099 or W-2 filing.

Worksheets & Tools

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We offer several helpful worksheets related to various income, expenditures, and deductions. These worksheets can be found our website within the Business Resources and Individual and Family Resources sections of our Forms page.

Fees, Services & Payments

We will be increasing our standard fee structure by approximately 5% of this year. For new clients or those that have already completed proposal and engagement letters specifically for the 2025 tax year, you will not see any change to your agreed upon fee. All other clients can expect a 5% increase in their engagement fee from last year.

We will be collecting tax preparation fees up-front at the time of document submission. Upon receipt of your documents, we will follow-up with an invoice of your estimated fee (based on the prior year's return). As we complete your return, we will submit a final invoice, if necessary, based on your 2025 return. Payments can be remitted electronically through links included with each invoice. Please contact us with any fee related concerns.

Your fee includes return preparation, meeting time (if necessary) and a limited amount of email and phone correspondence throughout the year regarding this particular tax year. If there are significant changes, or other tax or financial issues you would like to review with us either by email, phone, or in a separate meeting, we offer those services at an hourly rate or as a separate agreed upon engagement. We understand that tax and personal situations change throughout the year and we remain available to provide relevant and timely information for you.

In additional to tax planning and return preparation, we offer accounting services: bookkeeping, accounting system consultation and training, and budgeting. We also offer new business consultations, outsourced CFO services and other advice to small and medium-sized businesses. We encourage anyone interested in these services to contact us for further information.

In closing, we look forward to working with you this tax season and appreciate your choosing our firm for your tax preparation needs! As always, please do not hesitate to let us know should you have any questions or concerns along the way.

Cordially,

Rajani Pudipeddi, CPA
Managing Member