ORGANIZER				Page 1
2024	1040	US	Tax Organizer	
	570 GR NEW Y		FC A	Tax Return Appointment Date: Time: Location:
	E-mail a	address:	info@medowscpa.c	om
		of your 2	2024 tax return. Please e	ering information necessary for the preparation enter all pertinent 2024 information.
of: school rec records, place NOTE: If your	cords or staten ement agency r child is disat	nent, landlord (statement, so pled, please pro	or property management statem cial service records or statemer ovide one of the following forms	our child is a resident of the United States. This proof is typically in the form nent, health care provider statement, medical records, child care provider nt, place of worship, Indian tribal office statement, or employer statement. no f proof of disability: doctor statement, other health care provider statement,
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24	1040	US	Tax O	rganizer			
	a	Plea: governme	se enter all nt form for	pertinent 2024 an item, check	l informat the box a	ion. If you have attached and do not enter a 2024 a	amount.
	GES, SALA	RIES AND	TIPS			2024 Amount	2023 Amount
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INTE	EREST INCO	OME					
Paye	r name:						
						Attach Forms 1099-INT	
	DEND INCO	OME					
	r name: 					Attach Forms 1099-DIV	
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	ISIONS, IRA		MBLING IN	COME			
	ISIONS, IRA r name:	A AND GA	MBLING IN	COME		Attach Forms 1099-R & W-2G	
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Other:					
RET		PLAN CON	NTRIBUTIONS	2024 Amount	2023 Amount
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			s (1=maximum)		
	Self-employ	yed, SEP, SIMPL	E, & qualified plan contributions (1=maximum)		
Spous	e: Tradition	al IRA contri	butions (1=maximum)		
	Roth IRA	contribution	s (1=maximum)		
	Self-employ	yed, SEP, SIMPL	E, & qualified plan contributions (1=maximum)		
отн	ER GOVEF	RNMENT F	FORMS - DEDUCTIONS		
			interest	\square Attach Forms 1098 \square	
Fc	orm 1098-T - ⁻	Tuition and re	elated expenses		
AFFC	ORDABLE (CARE ACT			
Fo	orm 1095-A - ⊢	lealth Insuran	ce Marketplace Statement	Attach Forms 1095	
AD.JI	USTMENT		OME		
Тахра					
		nealth insura	nce premiums		
Ec	ducator expen	ses			
Ot	her adjustme	nts to income	2:		
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-		•	pt autos and special items)		
		2024 purchase			
		-	urn		
Sales	tax on autos	not included a	above		
Sales	taxes paid or	n boats, aircra	ft, and other special items		
Real e	estate taxes -	principal resid	dence		
Real e	estate taxes -	property held	for investment		
			uding automobile fees in some states)	Attach Tax Notice	
	REST PAI				
Home	mortgage int	erest and poir	its paid:		
$\mid - \mid - \mid$				Attach Forms 1098	
	aortaago intoroct	not on Form 1008	(include name, SSN, & address of payee):		
nume n	nortgage interest		(include fiame, SSN, & address of payee).		
Points	s not reported	on Form 1098	3.		
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CLIENT IN Filing Status Taxpayer Status Taxpayer Status Taxpayer Status Taxpayer Status Taxpayer Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status Status S	EW YORK NY 1000 elephone number: ax number: -mail address: This tax organize of your 2024 tax NFORMATION ng status (table) married filing separate a ar spouse died, if qualif st name and initial st name. e/suffix	02 a (646) 415-8011 (646) 514-9149 info@medowscpa.com er will assist you in gathering inform and lived with spouse ying surviving spouse (2022 or 2023)	Time: Location: nation necessary fo lete information as a	
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2024	1040	US	Client Information (continued)	1 _{p2}
			Please add, change or delete information for 2024.	
CLIEN	T INFOF	RMATION		
Taxpayer Contact Information	Work phone Work exten Daytime ph Mobile pho	ne	Dayti 1 2 3	me Phone = Work = Home = Mobile
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Spouse uthentication	Issue date Expiration ((m/d/y) date (m/d/y).		
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ORGANIZER				Page 7
2024	1040	US	Miscellaneous Questions	
	lf any	of the foll app	llowing items pertain to you or your spouse for 2024, please check the propriate box and provide additional information if necessary.	
YES	NO	Did your i	marital status change during the year?	
		Did your a	address change during the year?	
		Could you	ou be claimed as a dependent on another person's tax return?	
		Were ther	ere any changes in dependents?	
		Did you a	and your dependents have health care coverage for the full-year?	
		Did you re	receive an IRS document 1095-A (Health Insurance Marketplace Statement)? If so, please attach.	
		Did you re	receive unreported tip income of \$20 or more in any month?	
		Did you re	receive any disability income?	
		Did you b	buy or sell any stocks, bonds or other investment property?	
		Did you p	purchase, sell, or refinance your principal home or second home, or did you take a home equity loa	n?
		Did you n energy so	make any residential energy-efficient improvements or purchases involving solar, wind, geothermal ources?	or fuel cell
			receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?	
		Did you tr	transfer or rollover any amount from one retirement plan to another?	
		Did you c	convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?	
		Did you, y vocationa	your spouse, or a dependent incur any tuition expenses that are required to attend a college, unive al school?	ersity, or
		Did you ir	incur a loss because of damaged or stolen property?	
		Did you u	use your car on the job (other than to and from work)?	
		May the I	IRS discuss your tax return with your preparer?	
		Was your	r home rented out or used for business?	
		Were you	u notified or audited by either the IRS or the State taxing agency?	
		At any tin	me during the tax year, did you: receive or sell, exchange, gift, or otherwise dispose of digital asset	t?

DIRECT OEPOSITI / ELECTRONIC PAYMENT (3) Indirect deposit of baderal lax return into bank account	I=direct deposit of federal tax refund into bank account			• • • · · ·			all pertinent 2	2 024 in	formation.			
1 =electronic payment of skinated tax	1 =electronic payment of astimated tax	DIRE	CT DEPO	SIT / EL	ECTRO	NIC PAY	MENT (3)					
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							J – Archer MSA					

GANIZER				Page 9
2024	1040	US	Direct Deposit & Estimates (Form 1040 ES) (cont.)	7.1
			Please enter all pertinent 2024 information.	1
APPL	ICATION	I OF 2024	4 OVERPAYMENT (7.1)	
	ave an overpa lease explain	١.	24 taxes, do you want the excess refunded? or applied to 2025 estimate?	
2025	ESTIMA	TED TAX	INFORMATION	
			ncome to be different from 2024? Yes	No
			ng to be different from 2024?	No
If "yes"	explain any di	ifferences:		
				7.1

24	1040	US	Foreign Income Exclu	ision (Form 2555)	No	31.1
			_			
			Please enter all pertinent 2	2024 information.		
GEI	NERAL IN	IFORMA	TION			
			lifferent from Form 1040:			
-	-					
-						
R	egion					
Emplo	-					
	-					
	8					
Fo	oreign postal o	code				
Fo	oreign country					
E	mployer type:	1=foreign e	entity, 2=U.S. company, U.S. company, 5=other			
			0.3. company, 3–other			
_						
Туре	of exclusion re	evoked if rev	oked in earlier year (if applicable):	Tax year revocation was effective		
					-	
					-	
Count	try of citizensh	nip				
City a	ind country of	separate for	eign residence if maintained due to licable):	Number of days during tax year at separate foreign address (if applicable)		
adver	se living cond	itions (ii appi	icable):	foreign address (if applicable)		
					-	
Tay b				Dates tax home(s) were established (m/d/y)		
Tax n	omes(s) durin	ig tax year:		established (m/d/y)		
					-	
						31.
						J.

BONA FIDE RESIDENCE TEST AND PHYSICAL PRESENCE TEST Beginning date for bona fide residence (m/d/y) Ending date for bona fide residence (m/d/y) Living quarters in foreign country: 1=purchased home, 2=rented house or apartment, 3=rented room, 4=quarters furnished by employer Names of family living abroad with taxpayer (if applicable): Relationship Period family lived abroad 1=submitted statement to country of bona fide residence 1=required to pay income tax to country of bona fide residence Type of visa you entered foreign country (if applicable) Explanation why visa limited stay or employment in country (if applicable) Address of home in U.S. maintained	31.1
NOTE: Please enter all travel for 2024 as well as travel for 2025 known to date. Travel Type (table) Name of country (f not United States) Date arrived Date left Days in U	
Travel Type (table) Name of country (if not United States) Date arrived Date arrived arrived Date arrived arriv	
	S. on business
Beginning date for bona fide residence (m/d/y)	
Beginning date for bona fide residence (m/d/y)	
Beginning date for bona fide residence (m/d/y)	
Beginning date for bona fide residence (m/d/y)	
Beginning date for bona fide residence (m/d/y)	
Ending date for bona fide residence (m/d/y) Image frame (m/d/y) Living quarters in foreign country: 1=purchased home, 2=rented house or apartment, 3=rented from, 4=quarters turnished by employer Period family lived abro Image of family living abroad with tapager (if applicable): Relationship Period family lived abro Image of family living abroad with tapager (if applicable): Relationship Period family lived abro Image of family living abroad with tapager (if applicable): Relationship Period family lived abro Image of family living abroad with tapager (if applicable): Relationship Period family lived abro Image of visa you entered foreign country of bona fide residence Image of visa you entered foreign country under Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered foreign country (if applicable) Image of visa you entered fore	
Living quarters in foreign country: 1=purchased home, 2=rented house or apartment, 3=rented room, 4=quarters furnished by employer Names of family living abroad with taxpayer (if applicable): I=submitted statement to country of bona fide residence I=required to pay income tax to country of bona fide residence Contractual terms relating to length of employment abroad Type of visa you entered foreign country under Explanation why visa limited stay or employment in country (if applicable) Address of home in U.S. maintained while living abroad (if applicable): Principal country of employment FOREIGN HOUSING EXPENSES 2024 Amount 2023 Amount 2024 A	
Names of family living abread with taxpayer (if applicable): Relationship Period family lived abread with taxpayer (if applicable): 1=submitted statement to country of bona fide residence	
Names of family living abread with taxpayer (if applicable): Relationship Period family lived abread with taxpayer (if applicable): 1=submitted statement to country of bona fide residence	
1=required to pay income tax to country of bona fide residence	ad
1=required to pay income tax to country of bona fide residence	
1=required to pay income tax to country of bona fide residence	
1=required to pay income tax to country of bona fide residence	
Contractual terms relating to length of employment abroad	
Explanation why visa limited stay or employment in country (if applicable) Image: Code in the code in th	
Address of home in U.S. maintained while living abroad (if applicable): IIII ZIP Code IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	
while living abroad (if applicable): ZIP Code ZIP Code Image: Code Names of occupants in U.S. home (if applicable) Relationship of occupants in U.S. home (if applicable) Principal country of employment. Image: Code FOREIGN HOUSING EXPENSES 2024 Amount 2023 Amount Qualified housing expenses Image: Code Image: Code Image: Code Location of housing expenses: Qualifying days in location (multiple locations) Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code Image: Code <th></th>	
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Principal country of employment. 2024 Amount 2023 Amount Principal country of employment. 2023 Amount 2023 Amount Qualified housing expenses. Qualifying days in location (multiple locations Location of housing expenses: Qualifying days in location (multiple locations Image: Comparison of the second	
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FOREIGN HOUSING EXPENSES 2024 Amount 2023 Amount Qualified housing expenses	
FOREIGN HOUSING EXPENSES 2024 Amount 2023 Amount Qualified housing expenses	
FOREIGN HOUSING EXPENSES 2024 Amount 2023 Amount Qualified housing expenses	
Qualified housing expenses	
Qualified housing expenses	unt
Travel Type	unt
1 = Travel to U.S. (default)	only)
1 = Travel to U.S. (default)	
1 = Travel to U.S. (default)	
1 = Travel to U.S. (default)	
1 = Travel to U.S. (default) 2 = Travel to foreign country	
3 = Travel to restricted country	

24	1040	US	Foreign Income Exclu		-,		31.2
	Please e Entei	nter all per r amounts	rtinent 2024 amounts and attach in U.S. dollars only. Last year's a	all W-2 forms, or othe amounts are provided	er wage state for your ref	ements. erence.	
FOR	EIGN WA	GES, SA	LARIES, TIPS	2024 Amount		2023 Amoun	t
Name c	or number						•
		· ·					
			Box 1)				
-			2)				
Social s	security tax wi	thheld (Box 4))				
)				
Local ir	icome tax with	inela (Box 19))				
Car			·····				
Car							
Car							
Car							
Car Other p	roperties or fa	acilities:					
Car Other p	roperties or fa	acilities:	ements				
Car Other p Allow Cost of	roperties or fa	Reimburse	ements				
Car Other p Allow Cost of Family.	roperties or fa	Reimburso	ements				
Car Other p Allow Cost of Family. Educati	roperties or fa ances and living and ove	Reimburse	ements				
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Car Other p Allow Cost of Family. Educati Home la Quarter Other p Meals a Employ	ances and living and ove on	Reimburso rseas differer	ements ntial				
Car Other p Allow Cost of Family. Educati Home la Quarter Other p Meals a Employ	ances and living and ove on	Reimburso rseas differer	ements ntial				

NIZER	1					Page
24	1040	1040USReport of Foreign Bank and Financial Accounts				
	Please en	ter all per	tinent 2024 amounts. Last year's amo	ounts are provided fo	r your reference	·-
GEI	NERAL IN	IFORMA	TION	2024 Amount	2023 Amou	ınt
Canad	dian province	or Mexican s	tate			
Other	type of filer					
Foreig	n identification	:				
Та	axpayer:		_			
	1=passpor	t, 2=foreign T	IN			
	Other type	of identificat	ion			
	Number					
	Country of	issue				
S	pouse:					
	1=passpor	t, 2=foreign T	ΊΝ			
	Other type	of identificat	ion			
	Number					
	Country of	issue				
Тахра	iyer:		_			
Ti	tle					
Spous	se:		_			
Ti	tle					

24	1040	US	Report of Foreign Bank &	Fin. Accts.	No.	82.1 _P
	Please en	ter all peri	tinent 2024 amounts.Last year's amo	unts are provided fo	r your reference.	
				2024 Amount	2023 Amou	nt
			t, 2=securities account, or specify			
			unknown)		1	
	num value of a]
			(mandatory)			
	•					
	2					
	unts owned joir		······			J
	-	-	for Part III accounts) (-1 if joint owner is joint filer)			
	rincipal joint o		· · · · · · · · · · · · · · · · · · ·		I	J
			number, if not joint filer			
			N/ITIN, 3=foreign , 4=unknown			
			·····			
	First name	ə				
	Middle ini	tial				
	Address					
	City		·····			
	State					
	ZIP/posta	code				
	Country (i	f not US)				
Αссοι	unts where file	r has no finar	ncial interest:			
La	ast name or or	g. name (ma	ndatory)			
Fi	irst name					
Μ	liddle initial					
Ta	axpayer identif	ication numb	er			
Т	IN type: 1=EIN	, 2=SSN/ITIN	I, 3=foreign , 4=unknown			
A	ddress					
	5					
			·····			
			·····			
F	iler's title					

Type of Entity

- 1 = Partnership
- 2 = Corporation
- 3 = Trust
- 4 = Estate

24	1040	US	Foreign Reporting (8938) (continued)	No.	82.2
	Please en	ter all per	tinent 2024 amounts. Last year's amounts are provided for	or your reference	
ОТН	IER FOREIG	IN ASSETS	6 (Part II) (continued)		
ssue	r or counterpart	v (#1):			
1	=issuer, 2=cour	nterparty			
Т	ype of issuer or	r counterparty	(see table 2)		
			person, 2=foreign person		
Ν	lailing address				
С	;ity				
S	tate/province .				
P	ostal code				
С	ountry				
Issue	r or counterpart	y (#2):			
Ν	lame				
1	=issuer, 2=cour	nterparty			
Т	ype of issuer or	r counterparty	(see table 2)		
ls	suer or counter	rparty: 1=US p	person, 2=foreign person		
Ν	lailing address				
С	ity				
S	tate/province .				
P	ostal code				
С	ountry				
ssue	r or counterpart	y (#3):			
Ν	lame				
Т	ype of issuer or	r counterparty	(see table 2)		
ls	ssuer or counter	rparty: 1=US p	person, 2=foreign person		
Ν	lailing address				
С	;ity				
S	tate/province .				
P	ostal code				
	r or counterpart				
			(see table 2)		
			person, 2=foreign person		
C	ountry	• • • • • • • • • • • • • •			

Type of Issuer or Counterparty

1 = Individual 2 = Partnership 3 = Corporation 4 = Trust 5 = Estate

GANIZER	1							Page
024	1040	US	Addition	al Inform	ation			
Plea	se furnish	any additi	onal informati	on or suppo	rting details	not provide	ed elsewhere i	n this tax organizer.
		-			-	·		-