

GRADY & ASSOCIATES

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- 1) Download to your computer.
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- 3) Open from the saved location, and then begin to work.

PDF Scanner

- The notes app on iPhone can scan documents into PDF. In notes app click new note, click the paperclip, click the camera. We highly prefer PDFs for smaller file size.

Secure file Portal

- Please never send sensitive information via email. Upload documents securely by clicking [HERE](#) or by visiting www.CPABroomfield.com.

No Piecemeal

- Please send 100% of tax documents in a single upload vs. multiple. That cuts down significantly on our administrative time.

Big Beautiful Bill updates

- Taxpayers who had not itemized deductions in the past may now be eligible. Please complete the itemized deductions schedule even if you think you might not itemize.
- Even if you don't itemize it is possible to get an above-the-line deduction for charitable contributions, so please input charitable contributions.

Amounts on Tax Organizer

- The tax organizer asks you to list amounts. For example, maybe you have a 1099 from Fidelity with various dividends, interest, and capital gains. We don't necessarily care what amount you list on the organizer. It is more or less a check for us that you provide the actual 1099 form. We care most that the actual tax form was uploaded.

Joint returns must include two unique email addresses which will be used for digital signature.

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.....		ZIP Code			
Home phone.....		Fax number					

Dependent Information					
First name Last name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

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
student loan interest

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation**Employer Name****Amount**

_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc**1099-R Payer Name****Amount**

_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits**Taxpayer****Spouse**

Social Security Benefits from Form SSA-1099	_____	_____
Railroad Retirement Benefits from Form RRB-1099	_____	_____
Medicare B premiums withheld	_____	_____
Medicare C premiums withheld	_____	_____
Medicare D premiums withheld	_____	_____

Attach Form(s) 1099-MISC – Miscellaneous Income and 1099-NEC

ATTACH SCHEDULE C ORGANIZER

1099-MISC Payer Name and 1099-NEC Payer Name

Attach Form(s) 1099-INT – Interest Income**1099-INT Payer Name****Amount**

_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV – Dividend Income**1099-DIV Payer Name****Amount**

_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Taxpayer**Spouse****Retirement Plan Contributions**

Traditional IRA contributions made	_____	_____
Roth IRA contributions made	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____

Do not enter 401(k) contribution amounts. Those will be listed on your W2.

Medical and Dental Expenses

Amount

Prescription medications..... **Out of pocket medical expenses must exceed 7.5% of adjusted gross income in order to count as an itemized deduction. For example if your AGI is \$100k, the first \$7,500 of out of pocket medical expense is not deductible. The amount over \$7,500 is deductible as an itemized deduction, assuming you qualify to itemize.**

Health insurance premiums

Doctors, dentists, etc

Hospitals, clinics, etc

Eyeglasses and contact lenses

Miles driven for medical purposes... ..

Other medical and dental expenses:

Taxes

Amount

Real estate taxes paid on principal residence

Real estate taxes paid on additional homes or land

Auto license registration fees based on the value of the vehicle

Other personal property taxes

Interest Expenses

Home mortgage interest paid — Attach Form(s) 1098.

Lender's Name

Amount

..... ..

Points paid on loan to buy, build or improve main home

Lender's Name

Amount

..... ..

Cash/Check/Credit Contributions

Amount

..... ..

..... ..

..... ..

CHECK BOX
IF ZERO

Noncash Charitable Contributions

Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

If > \$500 attach itemized schedule

Miscellaneous Deductions

Amount

Union and professional dues

Professional subscriptions, books, supplies

Uniforms and protective clothing (including cleaning)

Job search costs

Taxpayer educator expenses

Spouse educator expenses

Tax return preparation fees

Safe deposit box rental

Gambling losses (to the extent of gambling income)

Other expenses (list):

- 1 Did a lender cancel any of your debt in 2025? (Attach any Forms 1099-A or 1099-C)..... ☐
- 2 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2025? If **yes**, please attach details..... ☐
- 3 Did you purchase a motor vehicle or boat during 2025? ☐
If **yes**, attach documentation showing sales tax paid.
- 4 Did you purchase a hybrid or electric vehicle in 2025? If **yes**, enter year, make, model, and date purchased: ☐
- 5 Did you pay qualified passenger vehicle loan interest in 2025? ☐
If **yes**, attach documentation showing interest paid.
- 6 Did you donate a vehicle in 2025? If **yes**, attach Form 1098C..... ☐
- 8 Did your marital status change during 2025? ☐
If **yes**, explain:
- 9 Were you or your spouse permanently and totally disabled in 2025? ☐
- 10 Do you have dependents who must file? ☐
- 11 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,700?... ☐
- 12 Did you provide over half the support for any other person during 2025? ☐
- 13 Did you incur adoption expenses during 2025? ☐
- 14 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? ☐
- 16 Did you receive tip income **not** reported to your employer? ☐
- 17 a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2025? If **yes**, attach closing or escrow statements, 1099-C or 1099-A forms..... ☐
b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?..... ☐
- 18 Did you incur any casualty or theft losses during 2025? ☐
- 19 Did you incur any non-business bad debts? ☐
- 20 Did you pay any individual for domestic services in 2025? ☐
- 21 Did you take a retirement account distribution related to a natural disaster? ☐
- 22 Did you buy or sell any stocks or bonds in 2025? ☐
- 23 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?..... ☐
- 25 Did you receive any income not included in this Tax Organizer? ☐
If **yes**, please attach information.
- 26 Do you expect your income and deductions in 2026 to be the same as 2025? ☐
If **no**, attach explanation of changes expected.
- 27 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach ☐
- 28 At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?..... ☐
- 29 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____
- 30 Enter your state of residence..... **Taxpayer** _____ **Spouse** _____
- 31 a Do you want to change the language with which the IRS communicates with you? ☐
b If yes, which language?..... _____

Electronic Filing and Direct Deposit of Refund

Yes

The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.

If you receive a refund, would you like direct deposit? ☐

If **yes**, please provide a voided check (not a deposit slip) if your bank account information has changed.

What type of account is this?..... Checking ☐ Savings ☐

ESTIMATED TAXES PAID

Estimated taxes are direct payments made by self employed or individuals with high investment income. **DO NOT input W2 withholding.** We will pull that from your W2.

List dates and amounts paid for all federal estimated income taxes.

If you cannot remember the amounts of estimates made please create an account [here](#).

<https://www.irs.gov/payments/your-online-account>

	Date Paid	Amount Paid	
Federal Estimate #1			Do not input W2 withholding.
Federal Estimate #2			
Federal Estimate #3			
Federal Estimate #4			
Extension Payment			

List the dates and amounts paid for all Colorado estimated income taxes.

If you cannot remember the amounts of estimates made please create an account here.

<https://www.colorado.gov/revenueonline/>

	Date Paid	Amount Paid
Colorado Estimate #1		
Colorado Estimate #2		
Colorado Estimate #3		
Colorado Estimate #4		
Extension Payment		

Do not input W2 withholding.

List dates and amounts for estimated state income taxes of other states.

Name of State	Date Paid	Amount Paid

Do not input W2 withholding.

HEALTH INSURANCE REPORTING REQUIREMENTS

Did you purchase health insurance through a government marketplace exchange?

YES NO

If yes, please include a full copy of form 1095-A. It will look like the image below.

If you purchased insurance through a private plan or your workplace you would receive form 1095-B or 1095-C. We do not need to report B or C for Colorado residents. We only need form 1095-A.

Form 1095-A		Health Insurance Marketplace Statement		<input type="checkbox"/> VOID	OMB No. 1545-2232
Department of the Treasury Internal Revenue Service		Do not attach to your tax return. Keep for your records. Go to www.irs.gov/Form1095A for instructions and the latest information.		<input type="checkbox"/> CORRECTED	2023
Part I Recipient Information					
1 Marketplace identifier		2 Marketplace-assigned policy number		3 Policy issuer's name	
4 Recipient's name			5 Recipient's SSN		6 Recipient's date of birth
7 Recipient's spouse's name			8 Recipient's spouse's SSN		9 Recipient's spouse's date of birth
10 Policy start date		11 Policy termination date		12 Street address (including apartment no.)	
13 City or town		14 State or province		15 Country and ZIP or foreign postal code	

DIRECT DEPOSIT INFORMATION

If you checked yes for direct deposit of refund, please input bank information.

Routing Number (9 Digits)

Account Number

STATE 529 CONTRIBUTIONS

*The owner is the person that can make changes on the account, not the student or beneficiary.

Owner's Name	Owner's SSN	Contribution	State

AUTO LOAN INTEREST DEDUCTION – ON NEW VEHICLES

- Must be interest on the purchase of a new vehicle and purchased after 12/31/2024.
- It must be a personal non-business use vehicle.
- Do NOT input interest paid on the purchase of used vehicles.
- The loan must be in the taxpayer or spouse's name.
- It is fully phased out at AGI > \$250K married and > \$150k single.
- There is no specific tax form that you will receive. The best document is your December loan statement.
- Final assembly must have occurred in the USA. To test that enter vin [HERE](#).

Total Loan Interest Paid in tax year

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Vehicle Identification Number VIN

--

NO TAX ON OVERTIME

- You must be a non-exempt non-salaried employee under FLSA to qualify.
- Self-employed individuals do not qualify.
- This is NOT reported on your W2 because it was a mid-year tax law change. You must provide us with a year end pay stub showing the overtime portion of the wages.
- If AGI is over \$550k married or \$400k single you do not qualify, so don't waste your time here if income exceeds those limits.

Employer Name	Total Overtime Pay

***DO NOT INCLUDE OVERTIME PAY IF YOU ARE A SALARIED EXEMPT EMPLOYEE**

***PLEASE SEND COPY OF YOUR PAYSTUB FOR SUPPORT - THIS IS NOT ON YOUR 2025 W2**

NO TAX ON TIPS

- If AGI is over \$550k married or \$400k single you do not qualify.
- You must be in a profession that customarily receives tips as defined by a Treasury Tipped Occupation Code. Check box below for qualifying occupation.
- If you received cash tips that were not reported to your employer, those must be reported on form 4137 and social security tax will be added to that amount.

Employer Name	Total Tips Received

Check box below for your qualifying Treasury Tipped Occupation(s).

Beverage and Food Service

- ☐ Bartenders
- ☐ Wait Staff
- ☐ Food Servers, Non-restaurant
- ☐ Dining Room and Cafeteria Attendants and Bartender Helpers
- ☐ Chefs and Cooks
- ☐ Food Preparation Workers
- ☐ Fast Food and Counter Workers
- ☐ Dishwashers
- ☐ Host Staff, Restaurant, Lounge, and Coffee Shop
- ☐ Bakers

Entertainment and Events

- ☐ Gambling Dealers
- ☐ Gambling Change Persons and Booth Cashiers
- ☐ Gambling Cage Workers
- ☐ Gambling and Sports Book Writers and Runners
- ☐ Dancers
- ☐ Musicians and Singers
- ☐ Disc Jockeys, Except Radio
- ☐ Entertainers and Performers
- ☐ Digital Content Creators
- ☐ Ushers, Lobby Attendants, and Ticket Takers
- ☐ Locker Room, Coatroom, and Dressing Room Attendants

Hospitality and Guest Services

- ☐ Baggage Porters and Bellhops
- ☐ Concierges
- ☐ Hotel, Motel, and Resort Desk Clerks
- ☐ Maids and Housekeeping Cleaners.

Home Services

- ☐ Home Maintenance and Repair Workers
- ☐ Home Landscaping and Groundskeeping Workers
- ☐ Home Electricians
- ☐ Home Plumbers
- ☐ Home Heating and Air Conditioning Mechanics and Installers
- ☐ Home Appliance Installers and Repairers
- ☐ Home Cleaning Service Workers

- ☐ Locksmiths
- ☐ Roadside Assistance Workers

Personal Services

- ☐ Personal Care and Service Workers
- ☐ Private Event Planners
- ☐ Private Event and Portrait Photographers
- ☐ Private Event Videographers
- ☐ Event Officiants
- ☐ Pet Caretakers
- ☐ Tutors
- ☐ Nannies and Babysitters

Personal Appearance and Wellness

- ☐ Skincare Specialists
- ☐ Massage Therapists
- ☐ Barbers, Hairdressers, Hairstylists, and Cosmetologists
- ☐ Shampooers
- ☐ Manicurists and Pedicurists
- ☐ Eyebrow Threading and Waxing Technicians
- ☐ Makeup Artists
- ☐ Exercise Trainers and Group Fitness Instructors
- ☐ Tattoo Artists and Piercers
- ☐ Tailors
- ☐ Shoe and Leather Workers and Repairers

Recreation and Instruction

- ☐ Golf Caddies
- ☐ Self-Enrichment Teachers
- ☐ Recreational and Tour Pilots
- ☐ Tour Guides
- ☐ Travel Guides
- ☐ Sports and Recreation Instructors

Transportation and Delivery

- ☐ Parking and Valet Attendants
- ☐ Taxi and Rideshare Drivers and Chauffeurs
- ☐ Shuttle Drivers
- ☐ Goods Delivery People
- ☐ Personal Vehicle and Equipment Cleaners
- ☐ Private and Charter Bus Drivers
- ☐ Water Taxi Operators and Charter Boat Workers
- ☐ Rickshaw, Pedicab, and Carriage Drivers
- ☐ Home Movers