2025 Tax Organizer

Organization is pivotal when you're doing tax preparation. Having the following information can help improve the process and ensure a quick turnaround time.

Please complete the following information and provide via our [BridgePoint Tax ProClient] secure portal. If you do not have access to this portal, please send an email to: danlauraine@bridgepointtax.com.

- **BridgePoint Tax Consulting Client Data Form - with completed questionnaire**
  - **Personal Information**
    - **Existing clients** - only input changes to your prior year information
    - **New clients** - please complete all fields
    - **All clients – please update/complete the children information.**
    - **Please note: This form needs to be downloaded and updated in Excel or Google Sheets. It may not work on a phone/tablet.**
- **Education Expenses**
- **Children Information**
- **Charitable Donations**
- **Direct Deposit** *(upload to portal with voided check or document with information below)*
  - Account Type (Checking/Savings)
  - ABA Routing Number
  - Bank Name

  Existing clients – please confirm account information for new tax year!

Please provide the following documents (and any other documentation needed based on how you answered the questions on the Intake Form)

- W2's
- W2-G's
- 1098's
- 1099s (all types)
- HSA 5498-SA
- Schedule K-1's
- Property Tax Statements
- Vehicle Plate Renewals
- Medical Expenses (if over 7.5% of your adjusted gross income)

For business owners and rental properties

- Estimated Tax Payments for Federal and State
- Business Income and Expenses
- Rental Income and Expenses