



# E.A. BUCK

ACCOUNTING & TAX SERVICES

Happy New Year! Now is the time to start planning, organizing, and preparing your tax data for your 2024 income tax return. We have attached our updated tax organizer below that will assist you in gathering your tax information.

Once you have your tax documents ready, you may either:

1. Upload them through our [secure online portal](#)
2. Mail to our Honolulu office at: 55 Merchant St., #2100, Honolulu, HI 96813
3. You may drop them off at either our [Honolulu](#), [Aina Haina](#), or [Kahului](#) office. Office hours are generally 8:00 a.m. to 4:00 p.m., Monday through Thursday and 8:00 a.m. to 3:00 p.m. Friday. Kahului office hours vary, please call to confirm before dropping off.

Please **DO NOT staple, attach indexes/tabs, or insert dividers** on your tax documents as we scan each document. **Also please do not submit a USB drive, memory stick, or flash drive as our computers will not read them.** This will ensure quick and efficient processing of your tax return. Please note that your tax documents might not be returned as originally organized.

Please turn in your information by **February 28, 2025**, and our tax associates will help you to file before the initial April 15, 2025, deadline. Tax documents received between **March 01 and March 21, 2025**, will automatically be put on extension. We will assist you in calculating your extension payment (if any) based on the information provided. Tax documents received **after March 22, 2025**, will be extended with a zero payment due and E.A. Buck Accounting & Tax Services will not be responsible for any underpayment penalties or interest. In order to continue providing you with our services, we have established a simple guideline for our new 2025 pricing structure and below are the service levels.

- **Simple Tax Return – \$350**  
Service can include: W-2s, Interest, Dividends, 1099-Rs
- **Standard Tax Returns – \$580**  
Service can include: Simple Business, Rentals, Stock Sales, or a K-1
- **Moderate Tax Returns – \$700**  
Service can include: Moderate Business /Rental, multiple K-1s, or 990 Non-Profit
- **Complex Tax Returns – \$870**  
Services can include: Complex Businesses / Rentals, 1031 Exchanges, Multiple K-1s, Stock Options, Day Traders, 1041 Trust Tax Returns
- **Very Complex Tax Returns – Starting at \$1,160**  
Service can include: Multiple complex streams of income and deductions.

\* State Returns other than Hawaii will be charged an additional \$50 per state.

\*\* Prices shown do not include GET.

I truly appreciate having you as a client and if there are any questions, please feel free to call us. Looking forward to working with you soon!

**Kevin Nitta, EA**  
Tax Director  
E.A. Buck Accounting & Tax Services



# 2024 Personal Income Tax Return Data

**February 28, 2025** is the cut off day to submit tax documents to file before April 15, 2025.

**NAMES:**

Self \_\_\_\_\_ Social Security No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse \_\_\_\_\_ Social Security No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

**OCCUPATION:**

Self \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

Spouse \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_

**ADDRESS:** *Please list your current mailing address*

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Your marital status as of 12-31-24:**

Single     Married     Head of Household     Married Filing Separate

**1. Did you have any transactions involving virtual currency (i.e. Bitcoin)?**  Yes     No

*If Yes, please provide a statement of your transactions*

**2. Did you own an interest in any FOREIGN financial assets in 2024?**  Yes     No

*If Yes, are you filing your own FinCen or FBAR forms?*  Yes     No

**3. Provide your 6 digit Identity Protection (IP) PIN from IRS for tax year 2024 if received:** \_\_\_\_\_ Taxpayer    \_\_\_\_\_ Spouse

**If you have a tax refund, and wish to have a directly deposit, please provide a voided check.**

*(Only if we do not already have your bank account already on file from previous years)*

**Do you want your tax liability to be paid by your bank account?**  Yes     No

**DEPENDENTS ALLOWED TO BE CLAIMED FOR TAX YEAR 2024:**

Full Name	Date of Birth	Social Security No.	Relationship	Months Lived in Home	Student Y/N

**SALARIES & COMMISSIONS (FORM W-2 or 1099-NEC):**

*Don't forget to include your W-2 or 1099-NEC forms for salaries and commissions!*

Employer	Gross	Federal Tax	State Tax
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

**QUARTERLY ESTIMATED TAX PAYMENTS (Not from W-2 or General Excise Tax):**

	1st Qtr.: Apr. 15, 2024	2nd Qtr.: Jun. 17, 2024	3rd Qtr.: Sep. 16, 2024	4th Qtr.: Jan. 15, 2025
<b>Federal Tax</b>	\$	\$	\$	\$
<b>State Tax</b>	\$	\$	\$	\$

**INTEREST YOU EARNED (1099-INT) / Taxpayer/Spouse/Joint (Owner):**

*Don't forget to include your 1099 forms for interest and dividends!*

Received From	H / W / J	Amount	Non-taxable?
		\$	
		\$	
		\$	

**DIVIDENDS YOU EARNED (1099-DIV) / Taxpayer/Spouse/Joint (Owner):**

*Don't forget to include your 1099 forms for interest and dividends!*

Received From	H / W / J	Gross Amount	Capital Gains	Non-taxable?
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	

**CAPITAL GAINS AND LOSSES (1099-B):**

Item Sold	Date Sold	Date Acq	Selling Price	Cost	Gain (Loss)
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$

**RETIREMENT INCOME (1099-R):**

Name	Amount
	\$
	\$
	\$
	\$

**SCHEDULE K-1 (Partnerships / S-Corporations / Trusts):**

*Please list below and attach all K-1s to the organizer*


**SOCIAL SECURITY INCOME (SSA-1099):**

	Amount
Taxpayer	\$
Spouse	\$
Other	\$

**UNEMPLOYMENT INCOME (1099-G):**

	Amount
Taxpayer	\$
Spouse	\$

**IRA CONTRIBUTIONS FOR 2024 (Not 401(k) or from W-2):**

	Self	Spouse
Traditional IRA	\$	\$
ROTH IRA	\$	\$

**BUSINESS IRA CONTRIBUTIONS FOR 2024:**

	Self	Spouse
SEP	\$	\$
Solo 401k	\$	\$

## Itemized Deductions

### MEDICAL EXPENSES PAID BY YOU (Out of Pocket Expenses):

Subject to 7.5% of your Adjusted Gross Income

Medical Insurance Premiums (Exclude Medicare)	\$ _____	Eye Glasses	\$ _____
Prescription Drugs	\$ _____	Lab Fees	\$ _____
Other Medical Lodging	\$ _____	Long-Term Care Ins. (Taxpayer)	\$ _____
Other (list)	\$ _____	Long-Term Care Ins. (Spouse)	\$ _____

### TAXES:

Real Estate Tax (personal residence)	\$ _____	Other Real Estate Tax	\$ _____
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### INTEREST PAID (Principal Residence Only. Not Rentals):

\*Home Equity is only deductible if used to buy, build, or renovate your home

Home Mortgage	\$ _____	Closing Points on New Home Purchase or Refinancing	\$ _____
Home Equity Interest	\$ _____	Mortgage Insurance Premiums	\$ _____

### CONTRIBUTIONS (List Organizations):

Paid To: Cash Contributions	Amount	Paid To: Non-Cash Contributions	Amount
	\$ _____		\$ _____
	\$ _____		\$ _____
	\$ _____		\$ _____
	\$ _____		\$ _____
	\$ _____		\$ _____

### MISCELLANEOUS DEDUCTIONS (Some are not deductible for Federal but still deductible in the State of Hawaii):

Tax Preparation Fee	\$ _____	Safe Deposit Box	\$ _____
Work Uniforms	\$ _____	Union Dues	\$ _____
Work Tools	\$ _____	Telephone Used for Business	\$ _____
IRA Maintenance Fee	\$ _____	Prof. Books and Magazines	\$ _____
Books (job related)	\$ _____	Professional Dues	\$ _____
Tuition (job related)	\$ _____	Investment Expenses	\$ _____
Teaching Expenses	\$ _____	Other	\$ _____

### CHILD CARE (Baby Sitter, Preschool, Afterschool Care (A+, Kama`aina Kids)):

Does NOT include K-12 schooling

Name of Provider	Address	Amount Paid	Fed ID or SS#	General Excise # (Only if the provider's location is HI)
		\$ _____		
		\$ _____		
		\$ _____		
		\$ _____		

**OTHER INFORMATION:**

1. SOLAR (PV) put in service in 2024?  
\_\_\_\_\_
2. Purchase an ELECTRIC VEHICLE in 2024?  
\_\_\_\_\_
3. Do you have any EDUCATION expenses?  
*Please provide Form 1098-T from the college.*  
\_\_\_\_\_
4. Did you apply for health insurance through the Marketplace?  
*Please provide Form 1095-A Health Insurance Marketplace Statement.*  
\_\_\_\_\_

**BUSINESS USE OF PERSONAL VEHICLE:**

1. Type and Model of Vehicle \_\_\_\_\_
2. Date First Used for Business \_\_\_\_\_
3. Original Cost (Price paid) \$ \_\_\_\_\_
4. Total Miles Driven in 2024 \_\_\_\_\_
5. Business Miles Driven in 2024 \_\_\_\_\_
6. Personal Miles Driven in 2024 \_\_\_\_\_
7. Parking Fees Paid \$ \_\_\_\_\_
8. Cost of Gas, Oil, Repairs, & Maintenance \$ \_\_\_\_\_

**HOME OFFICE INFORMATION:**

1. Total Sq. Ft. of Entire Home \_\_\_\_\_
2. Total Sq. Ft. of Home Office \_\_\_\_\_
3. Home Office Expenses (utilities, internet, etc)  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

*(Safe Harbor = \$5 x H.O. sq. ft. up to 300 sq. ft.)*

**Rental or Business Income Worksheet**

Sch. E Or Sch. C	Rental Property or Business #1	Rental Property or Business #2
Description and address of property or business		
GROSS RENTS / REVENUE	\$ _____	\$ _____

**EXPENSES:**

Advertising / Promotions	\$ _____	\$ _____
Commissions and Fees	\$ _____	\$ _____
Contract Labor/Outside Svcs.	\$ _____	\$ _____
Maintenance Fees	\$ _____	\$ _____
Insurance	\$ _____	\$ _____
Mortgage Interest	\$ _____	\$ _____
Legal/Professional Fees	\$ _____	\$ _____
Property Management Fees	\$ _____	\$ _____
Office Expenses	\$ _____	\$ _____
Rent Paid	\$ _____	\$ _____
Repairs/Maintenance	\$ _____	\$ _____
Supplies	\$ _____	\$ _____
General Excise Taxes	\$ _____	\$ _____
Real Property Taxes	\$ _____	\$ _____
Travel	\$ _____	\$ _____
Business Meals	\$ _____	\$ _____
Utilities	\$ _____	\$ _____
Internet	\$ _____	\$ _____
Telephone	\$ _____	\$ _____
Dues & Subscriptions	\$ _____	\$ _____
Association Dues	\$ _____	\$ _____
Safe Deposit Box	\$ _____	\$ _____
Other	\$ _____	\$ _____
<b>TOTAL EXPENSES</b>	\$ _____	\$ _____

What is the rental percentage of the property in 2024? \_\_\_\_\_% \_\_\_\_\_%

Did you issue 1099-NEC in 2024?  Yes  No

**FIXED ASSETS (List any major improvements/purchases in 2024):**

Description	Amount	Date Purchased
	\$ _____	
	\$ _____	
	\$ _____	
	\$ _____	