E.A. BUCK
ACCOUNTING & TAX SERVICES

HAWAII
Honolulu
55 Merchant St., #2100
Honolulu, HI 96813

Kahului
33 Lono St., #310
Kahului, HI 96732

Kapolei
1001 Kamokila Blvd., #136
Kapolei, HI 96707

Aina Haina
850 W. Hind Dr., #102
Honolulu, HI 96821

COLORADO
DTC
4600 S. Syracuse St., #650
Denver, CO 80237

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

E.A. BUCK
ACCOUNTING & TAX SERVICES

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
Federal Tax	$	$	$	$
State Tax	$	$	$	$

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	Capitial 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	$

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 Svs.	$ ____________	$ ____________
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	$ ____________	$ ____________
TOTAL EXPENSES	$ ____________	$ ____________
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
	$	
	$	
	$	
	$	