

Tax Return Appointment: Date: _____ Time: _____ PM

Please complete this Organizer before your appointment. Include all statements (W-2s, 1099s, etc.)

1. Personal Information		Taxpayer		Spouse	
First name & Initial					
Last name					
Social Security number					
Date of birth					
Occupation					
E-mail address					
Work phone	Cell		Work	Cell	
Home phone	Fax		Home	Fax	
Address				Apt/Suite	
City				State	ZIP

Taxpayer Legally Blind ☐ Yes ☐ No Spouse Legally Blind ☐ Yes ☐ No
 Taxpayer Disabled ☐ Yes ☐ No Spouse Disabled ☐ Yes ☐ No
 Pres. Campaign Fund (Taxpayer) ☐ Yes ☐ No Pres. Campaign Fund (Spouse) ☐ Yes ☐ No
 Filing status: Single ☐ Head of Household ☐ Married filing joint ☐ Married filing separate ☐ Widower ☐ Year of Spouse death? _____

2. Dependents (Children & Others)

Name	Relationship	Date of Birth	Social Security Number	Months Lived With You	Disabled	Full Time Student	Dependent's Gross Income

Please answer the following questions to determine maximum deductions:

- | | | | |
|---|--|--|--|
| 1. Did your marital status change during the year? | ☐ Yes ☐ No | 14. Did you give a gift of more than \$19,000 to one or more people? | ☐ Yes ☐ No |
| 2. Did your address change during the year? | ☐ Yes ☐ No | 15. Did you go through bankruptcy, foreclosure, or repossession proceedings? | ☐ Yes ☐ No |
| 3. Were there any changes in dependents? | ☐ Yes ☐ No | 16. Did you incur a loss because of damaged or stolen property? | ☐ Yes ☐ No |
| 4. Did you receive unreported tip income of \$20 or more in any month? | ☐ Yes ☐ No | 17. Were you notified or audited by either the IRS or State taxing agency? | ☐ Yes ☐ No |
| 5. Did you receive any unemployment or disability income? | ☐ Yes ☐ No | 18. Did you work from a home office or use your car for business? | ☐ Yes ☐ No |
| 6. Did you buy or sell any stocks, bonds or other investment property? | ☐ Yes ☐ No | 19. May the IRS discuss your tax return with your preparer? | ☐ Yes ☐ No |
| 7. Did you purchase, sell, or refinance your principal home or second home, or take out a home equity loan? | ☐ Yes ☐ No | 20. Were you a citizen of, have income from, or live in a foreign country? | ☐ Yes ☐ No |
| 8. Did you convert part or all of your traditional/SEP/SIMPLE IRA to a ROTH IRA? | ☐ Yes ☐ No | 21. Did you own or have interest in any foreign assets or accounts, or have signature authority with any foreign financial accounts? | ☐ Yes ☐ No |
| 9. Could you be claimed as a dependent on another person's tax return? | ☐ Yes ☐ No | 22. Do you want to electronically file your tax return? | ☐ Yes ☐ No |
| 10. Did you pay anyone for domestic services in your home? | ☐ Yes ☐ No | 23. Did you buy any internet merchandise for which you did not pay sales/use tax? | ☐ Yes ☐ No |
| 11. Did you pay anyone for childcare services? | ☐ Yes ☐ No | 24. Health Insurance. Did you have ACA compliant health insurance during the year? (Attach Form 1095-A, 1095-B, and/or 1095-C) | ☐ Yes ☐ No |
| 12. Did you pay tuition or other education expenses for yourself or a dependent? (Attach Form 1098-T) | ☐ Yes ☐ No | 25. At any time during the year, did you: | ☐ Yes ☐ No |
| 13. Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? | ☐ Yes ☐ No | (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? | |

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PERSONAL INFORMATION UPDATE

INFORMATION ABOUT YOU:

YOUR NAME: _____

IF DECEASED IN 2025, DATE OF PASSING: _____

DRIVER'S LICENSE INFO:

STATE OF ISSUE: _____

DATE OF ISSUE: _____

DRIVER'S LICENSE NUMBER: _____

EXPIRATION DATE: _____

ANY FOREIGN BANK ACCOUNTS LAST YEAR? Y/N _____

DIGITAL ASSETS: At any time in 2025, did you (a) receive (as a reward, award, or payment for property or services) or (b) sell, exchange, gift, or otherwise dispose of a digital asst (or a financial interest in a digital asset)? Yes _____ No _____

INFORMATION ABOUT YOUR SPOUSE (IF APPLICABLE):

SPOUSE'S NAME: _____

IF WAS DECEASED IN 2025, DATE OF PASSING: _____

DRIVER'S LICENSE INFO:

STATE OF ISSUE: _____

DATE OF ISSUE: _____

DRIVER'S LICENSE NUMBER: _____

EXPIRATION DATE: _____

ANY FOREIGN BANK ACCOUNTS LAST YEAR? Y/N _____

DIGITAL ASSETS: At any time in 2025, did you (a) receive (as a reward, award, or payment for property or services) or (b) sell, exchange, gift, or otherwise dispose of a digital asst (or a financial interest in a digital asset)? Yes _____ No _____

DIRECT DEPOSIT/ BANKING QUESTIONS:

FOR DIRECT DEPOSIT OF YOUR REFUNDS, PLEASE LIST THE FOLLWING:

BANK'S ROUTING NUMBER _____

LAST 4 DIGITS OF YOUR ACCOUNT NUMBER _____

IF THIS INFORMATION IS DIFFERENT THAN MY INFO FROM LAST YEAR, I'LL CONTACT YOU FOR THE CORRECT BANKING INFO.

IF YOU'RE A NEW CLIENT, PLEASE INCLUDE ENTIRE ROUTING AND ACCOUNT NUMBERS.