

# Tax Organizer

## Personal Information

### Personal Information

	Name	SSN	Has IP PIN	Date of birth
Taxpayer				
Spouse				
Name of person to whom all information should be addressed, if not the taxpayer				
Street address, city, state, and ZIP				
	Occupation	Daytime phone	Evening phone	Cell phone
Taxpayer				
Spouse				
Taxpayer email				
Spouse email				

### Filing status at the end of the year

- ☐ Single
 ☐ Married
 ☐ Widowed - If widowed and your spouse died in this year enter the date of death \_\_\_\_\_
- ☐ Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of year? \_\_\_\_\_

### Yes No

- ☐ ☐ Are you or your spouse blind?
- ☐ ☐ Are you or your spouse disabled?
- ☐ ☐ Are you or your spouse a full-time student?
- ☐ ☐ Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund?
- ☐ ☐ At any time during the year did you receive, sell, exchange, or otherwise dispose of a financial interest in any virtual currency?
- ☐ ☐ If you were 18 years of age, or under 24 and a student, at the end of the year, were you in foster care on or after turning 14 years of age and agree this status can be disclosed to the IRS?
- ☐ ☐ If you were 18 years of age, or under 24 and a student, at the end of the year, were you homeless or at risk of becoming homeless and supporting yourself?

### Identification Information

#### Taxpayer's type of photo ID

- ☐ Driver's license
 ☐ State-issued photo ID

Photo ID number \_\_\_\_\_

State photo ID was issued \_\_\_\_\_

Date photo ID was issued \_\_\_\_\_

Date photo ID expires \_\_\_\_\_

#### Spouse's type of photo ID

- ☐ Driver's license
 ☐ State-issued photo ID

Photo ID number \_\_\_\_\_

State photo ID was issued \_\_\_\_\_

Date photo ID was issued \_\_\_\_\_

Date photo ID expires \_\_\_\_\_

### Account Information for Deposits and Withdrawals

Name of bank	Bank routing number	Bank account number	Type of account		Use this account for	
			Checking	Savings	Deposits	Withdrawals

### Appointment Information

Your next appointment is scheduled for \_\_\_\_\_