

## Income Tax Organizer for Tax Year 2019

Name: \_\_\_\_\_  
 DOB \_\_\_ / \_\_\_ / \_\_\_ Occupation \_\_\_\_\_

Spouse Name: \_\_\_\_\_  
 DOB \_\_\_ / \_\_\_ / \_\_\_ Occupation \_\_\_\_\_

**Filing Information:**

Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_ ZIP \_\_\_\_\_  
 \*Previous year clients may check here if unchanged: Same \_\_\_  
 Phone \_\_\_\_\_ Type \_\_\_\_\_  
 Spouse Phone \_\_\_\_\_ Type \_\_\_\_\_  
 Othr Phone \_\_\_\_\_ Type \_\_\_\_\_  
 Othr Phone \_\_\_\_\_ Type \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Spouse email: \_\_\_\_\_

Filing Status:  
 **Single**    **Head of Household**    **Qualifying Widow**  
 **Married Filing Joint**  
 **Married Filing Separate** (Enter Name/SSN of Spouse in notes)  
 Total Number of People Living in Your Home: \_\_\_\_\_  
 Number to be Claimed as Dependents: \_\_\_\_\_  
 Please provide information on any new dependents on page 2.  
 ! New clients are required to provide all dependent information on page 2.

**Income:**

**Form Count**

If you or your spouse worked for an employer, list the number of W-2s provided.	W-2s _____
If you or your spouse received unemployment in the past year, list the number of 1099Gs provided.	1099G _____
If you or your spouse provided any services for non-employers, list the number of 1099-Ms received.	1099-Misc _____
If you or your spouse received interest from any bank, credit union, insurance companies, etc.	1098-INT _____
If you or your spouse received dividends from mutual funds or stocks, include forms 1099-DIV.	1099-DIV _____
If you or your spouse sold stocks or mutual funds, include forms 1099-B.	1099-B _____
If you or your spouse received Social Security/Social Security Disability (SSI), include forms SSA-1099.	SSA-1099 _____
If you or your spouse received regular retirement income/IRA distributions, include forms 1099-R.	1099-R _____ *
* Is any military retirement? ___ If it's for a deceased spouse, please list spouses DOB ___ / ___ / ___	
If you or your spouse withdrew from an IRA/401K as an early withdrawal, include forms 1099-R.	1099-R _____ *
* Please list the purpose of the early withdrawal _____	
If you or your spouse rolled over an IRA/401K to another account, include forms 1099-R.	1099-R _____
If you or your spouse received a state income tax refund, include form 1099G or fill in amount.	1099G ___ \$ _____
If you received any other income forms (ex: K-1 statement for partnership or S-Corp), list and provide.	Other _____
<i>*If you operated a business with substantial expenses or startup costs, contact our office for a consult.</i>	Call for Appointment
Please describe any other income received this year that you believe may affect your income tax return: _____ _____	

