

TOTAL TAX SERVICE, LLC

Client Income Tax Organizer

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BASIC INFORMATION

New client? ☐ Yes ☐ No If yes, how did you hear about us? _____

Taxpayer: _____ SSN: _____ DOB: _____

Spouse: _____ SSN: _____ DOB: _____

Address: _____ Home Phone: _____

City/State/Zip: _____ Cell Phone Taxpayer: _____

Cell Phone Spouse: _____

Email Taxpayer: _____

Email Spouse: _____

If you are due a refund, how would you like it?

☐ Mailed Check

☐ Direct Deposit: _____ Routing # _____ Account # _____

DEPENDANTS

Full Name	SSN	Date of Birth	Relationship

Child Care

Child's Name	Care Provider	Tax ID or SSN	Cost

Education / Tuition

Student's Name	Unreimbursed Tuition Amount

Did You Complete An Adoption Last Year?

☐ Yes ☐ No

If yes, what were your adoption Current Year: \$ _____

expenses over the last two years? Prev Year: \$ _____

INCOME

Do you have all your info?

- ☐ W2's ☐ Soc Security Income
- ☐ 1099's ☐ Pension/Ret Distribution
- ☐ Interes Income ☐ K-1 from Partnership/LLC
- ☐ Dividend Income ☐ Unemployment Comp
- ☐ Investment Earnings

Did you receive any of the following?

- ☐ Alimony ☐ Stock/Investment Sales
- ☐ Gambling Winnings ☐ Sold Property
- ☐ State Refund Last Year ☐ Rental Property Income
- ☐ Cancellation of Debt ☐ Other Income

Are you self employed or have ownership of any business?

- ☐ Yes ☐ No

If yes, name and address of company: _____

EXPENSES

Do any of the following apply to you?

- ☐ Paid Alimony \$ _____ Recipients SSN: _____
- ☐ IRA Contributions \$ _____ (Traditional IRA Only)
- ☐ New Car Purchase \$ _____ (or sales contract)
- ☐ Auto Registration \$ _____
- ☐ Out of Pocket Med \$ _____
- ☐ Charitable Contr \$ _____
- ☐ Moving Expenses \$ _____

- ☐ Estimated Tax Pmt \$ _____
- ☐ AZ School Donation \$ _____
- ☐ 1098 Mortgage Interest \$ _____
- ☐ Real Estate Taxes \$ _____
- ☐ Student Loan Interet \$ _____
- ☐ Student Tuition & Fees \$ _____

UnReimbursed Business Expenses

- Job Description _____
- ☐ Meals/Entertainment ☐ Tip Outs _____
- ☐ Travel Expense ☐ Phone _____
- ☐ Dry Cleaning ☐ Uniforms _____
- ☐ Union dues ☐ Supplies _____

Automobile Expenses

- Vehicle Year _____
- Make _____
- Model _____
- Purchase Date _____
- Business Mileage _____

All information on this form is general in nature, not legal advice and not warranted or guaranteed.
Do not rely solely on this information for tax preparation purposes. Tax laws change over time.