

## 2025 Tax Organizer Personal Information

### Personal Information

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

### Filing status at the end of 2025

- Single   
  Married   
  Widowed - If widowed and your spouse died after December 31, 2023, 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 2025? \_\_\_\_\_

### 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 2025 did you:
  - (a) receive (as a reward, award, or payment for property or service) a digital asset?
  - (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

### Identification Information

#### Taxpayer's type of photo ID

- Driver's license   
  State-issued photo ID

#### Spouse's type of photo ID

- Driver's license   
  State-issued photo ID

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

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

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

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

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

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

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

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 2025 appointment is scheduled for \_\_\_\_\_