

Tax Organizer
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Please provide: W-2s, all 1099s, 1098s, Voided Check (for direct deposit of refund).
New Clients: Provide copy of prior year tax return.

	First	M	Last	Occupation	Birthdate	SS Number	Tuition/Books	Form 1098-T
Taxpayer								
Spouse								
Address						E-mail		
Home Phone				Cell Phone			Cell Phone	

Dependent Information							
Name	SS Number	Birthdate	Relationship	Form 1098-T	Tuition	Books	

Child Care Expenses			
Provider's Name	Address	SS # or EIN	Amount Paid

Estimated Tax Payments		IRA Contributions		Health Savings Acct (HSA)	
Federal			Amount		Amount
Date	Amount			Contributions	
		Trad IRA - Taxpayer		Withdrawals	
		Trad IRA - Spouse			
		Roth IRA - Taxpayer			
		Roth IRA - Spouse			

Income			
Do you have any of the following income?			
	Yes	No	Amount
Alimony - Divorce Date			
Commissions 1099's			Include Tax Form
Debt Forgiveness			Include Tax Form
Disability			
Dividends			Include Tax Form
Gambling			
Installment Sales			Include Tax Form
Interest - Bank, Etc.			Include Tax Form
IRA Distributions			Include Tax Form
Land Sales			
Partnership/S-Corp/Trust/Estate (K-1)			Include Tax Form
Prizes and Awards			
Retirement 1099R			Include Tax Form
Royalties			Include Tax Form
Social Security			Include SS Stmt
Stock Sales (Sell Price & Cost)			Include Tax Form
Unemployment			Include Tax Form
Wage W-2's			Include Tax Form
Bought/Sold Virtual Currency?			

Other Items		
Have any of the following occurred this year?		
	Yes	No
Blind - Taxpayer		
Blind - Spouse		
Early Dist. from IRA/Pension Accounts		
Marital Status Changed		
Home Energy - i.e. furn, a/c, windows, ext. doors		
Solar Credit		
New Mailing Address		
Refinanced Home - need closing stmt		
Bought or Sold Home - need closing stmt		
Any foreign accounts?		
Started a New Business		
Alimony Paid		
Name		
SS#		
Amount		
Divorce Date		
Renewed DL - issue & exp date		
Refund - Direct Deposit or Mail?		

