

2022 Individual Taxpayer Organizer

Taxpayer				Tax ID # *	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email	IP PIN	
Occupation		Date of birth		Are you new to our firm? Yes No	
Address		City		State	Zip
County		Primary phone		Secondary phone	
Driver's License No.	State		Issue Date	Exp. Date	

Spouse				Tax ID # *	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email	IP PIN	
Occupation		Date of birth		Are you new to our firm? Yes No	
Address <small>(If different from Taxpayer)</small>		City		State	Zip
County		Primary phone		Secondary phone	
Driver's License No.	State		Issue Date	Exp. Date	

If you moved during 2022, enter your previous address.	Date of move
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Marital status at 12/31/22: Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure
 Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No
 Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.
 Have you received any notice from the IRS or state revenue department within the past year? Yes No

Names of dependent children <i>Child's full name</i>	Tax ID # *	IP PIN	Date of birth	Months lived in home in 2022	Relationship to taxpayer	College student?

Did any of the children have unearned income above \$1,150 for the year? Yes No Do any of the children have a disability? Yes No
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2022? Yes No

Other dependents or people who lived with you						
Name	Tax ID # *	IP PIN	Date of birth	Months lived in home in 2022	Relationship	Income

Bank information: Use for	Direct deposit of refund	Direct debit of balance due	Name of bank
Checking Savings	Routing transit number		Account number

Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.

*A Tax ID # is either a Social Security Number (SSN), adoption taxpayer identification number (ATIN), or an individual taxpayer identification number (ITIN).