

202_ TAX ORGANIZER PERSONAL INFORMATION

Name _____		SSN _____	Date of birth _____	Has IP PIN _____
Taxpayer _____		Spouse _____		
Name of person to whom all information should be addressed, if not the taxpayer _____				
Street address, city, state and ZIP _____				
Occupation _____	Cellphone _____	Taxpayer email _____		
Taxpayer _____	Spouse email _____		Date _____	
Spouse _____		Client Type _____		
Filing Status at the end of tax year		Married filing separately- if married but filing separately, did you live apart from your spouse for the last six months of tax year		
Single <input type="checkbox"/>	Married <input type="checkbox"/>	Widowed <input type="checkbox"/>		
Head of Household <input type="checkbox"/>				

IDENTIFICATION INFORMATION

Taxpayer's type of photo ID		Spouse's type of photo ID		
Driver's license <input type="checkbox"/>	State-issued photo ID <input type="checkbox"/>	Driver's license <input type="checkbox"/>	State-issued photo ID <input type="checkbox"/>	
Photo ID number _____	Photo ID number _____			
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 Account number	Type of Account		Use this account for		Bank Rounting Number	Notes
Bank	Account number	Checking	Savings	Deposits	Withdrawals	Rounting Number	

DEPENDENT AND OTHER INFORMATION

First and last name	SSN	Relation	Months	Date of birth	Full-Time Student	Disable

OTHER DEPENDENTS OR PEOPLE WHO LIVED WITH YOU

Name	Social Security #	Date of Birth	Relationship	Income

INCOME

Wages & Salaries W-2	Forms 1099-R Retirement	Forms 1099-MISC	Forms 1099-DIV Dividends
			Forms 1099-INT interest
Forms 1099-NEC	Other Income and Adjustments		
	Unemployment Compensation (attach Forms 1099-G)		
	Gamblings winnings (attached Forms W2-G)		
Alimony paid _____	Contributions made to a Health Savings Account (HSA)		
Name _____	Contributions made to a Self-Employed Pension Plan (SEP)		
SSN _____	Contributions made to an Individual Retirement Account (IRA)		
Provide additional statements if more room is needed.	Contributions made to a Roth IRA		
	Interest paid on a student loan		
	Passive Income K1s		

Taxpayer signature _____	Spouse signature _____
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