

Client Tax Organizer

We are most frequently asked, "what do I need to bring with me to do my taxes?" The following is a list of what **MOST** people will need. You may print this form and bring actual documents with you to your appointment or drop-off. For most previous clients we will have personal information, but things do change at times.

Taxpayer Name _____

Taxpayer SSN _____

Taxpayer Birthdate _____

Occupation _____

Spouse Name _____

Spouse SSN _____

Spouse Birthdate _____

Occupation _____

Address _____

City/Zip Code _____

Phone Number _____

Phone Number _____

City Residency Y or N _____

School District _____

Children's Full Names, SSN, Birthdates,
SS Cards, Etc.

All W-2 Forms for Both Spouses

Any Unemployment Received

Any Pensions Received

Any IRA/401K Withdrawals

Any Social Security Received

SSI Received

Any Bank Interest Paid to You

Any Stock Dividends Paid to You

Child Support Received

Any State/City Refunds Last Year

State Aid Received

Stock/Property Sales

For business and rental income and expenses,
see additional worksheet on this site.

Mortgage Interest Paid

Property Taxes Paid

Home Rent Paid

Home Landlord

License Plate Fees

Any Donations Made

Childcare Expenses Paid

Estimated Taxes Paid