TAX PLUS ETC
Your Partner in Business Solutions and Growth

Client Tax Organizer
Tax Year(s)

_____

TP/SP ID Current __/__
TP/SP Social on file __/__
Dependent(s) Soc. on file __

Please complete this Organizer before you see the Tax Preparer.

1. Personal Information

	Name	Social Security #	Date of Birth	Occupation	Main Contact
Taxpayer					
Spouse					Other Contact
Street Address		City	State	Zip	
Email Address					

	Taxpayer		Spouse		Maritial Status
Blind	☐ Yes	☐ No	☐ Yes	☐ No	☐ Married Will file Jointly Yes ☐ or No☐
Disabled	☐ Yes	☐ No	☐ Yes	☐ No	☐ Single ☐ Head of Household
Pres. Campaign Fund	☐ Yes	☐ No	☐ Yes	☐ No	☐ Widower, Date of Spouse's death _____

2. Dependents (Children & Others)

Name (First, Last)	Relationship	Date of Birth	Social Security Number	Months dependent lived with you	Disabled	Fulltime Student	Dependent's Gross Income

3. Wage, Salary Income (Attach W2s)

Employer	Taxpayer	Spouse
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐

4. Interest Income (Attach 1099-Int, Form 1097 BTC & Broker Statements)

Payer/Bank/W2-G	How Many
Unemployment	

5. Child & Other Dependent Care Expenses

Name of Care Provider	Address	Social Security Number or Employer ID	Amount Paid

1. Are you self-employed or receive hobby income? ☐Y* ☐N
2. Did you receive income from farm-animals,crops? ☐Y* ☐N
3. Did you receive rental income-property,other? ☐Y* ☐N
4. **Did you receive any letters from IRS or State ? ☐Y*☐N**
5. Were there any births,deaths,marriages,divorces? ☐Y* ☐N
6. **Did you receive health insurance for the year? ☐Y* ☐N**
7. **Health insurance received thru Marketplace? (1095-A Required) ☐Y* ☐N**
8. Did you give a chartiable contribution of 14,000 or more? ☐Y* ☐N
9. Did you have any debts cancelled or forgiven? (Form 1099C) ☐Y* ☐N
10. Did you pay interest for a student loan? **☐Y*☐N**
11. Did you pay expenses for secondary education? (1098T required) ☐Y* ☐N
12. **Do you owe the IRS, State, child support and/or school loans? ☐Y* ☐N**

TP Signature_____ **Date**_____

SP Signature_____ **Date**_____

Your signature attest to the fact that the information above is correct to the best of your knowledge.

Referred by _____

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