

2024 Tax Organizer

General Information

Full Name: _____

Social Security Number: _____ Occupation: _____

Date of Birth: _____ Age: _____ Legally blind: _____

Home/cell phone: _____ Best time to call: _____

E-mail: _____

- **For new clients, please provide copies of social security cards and driver's licenses or state ID card.**

Complete Address: _____

County name: _____ School district: _____

Resident state: _____ Non-resident state: _____

Marital status: Married Single Divorced Separated Widowed

Income

- Please list all employers below. Enclose a copy of each W-2, as well as any statements from your employer(s) showing benefits withdrawn from your pay during the year. Also, enclose your final paycheck stub for the year if you have it available.

Employer	Employer

- Do you have income from any other source? _____ If so, please list below.
- Did you pay tuition and fees? _____ If so, please enclose 1098-T from the college.
- How much rent did you pay last year? Did it include heat?

Direct Deposit

- If you want your refund to be directly deposited into your account, please list the information below and enclose a voided check. (Do not use a deposit ticket. Many times they have an internal routing number instead of an official routing number.)

Name of bank: _____ Please circle: savings or checking

Routing number: _____

Account number: _____

The information listed on this form is accurate to the best of my knowledge. (Please sign below).

Taxpayer