

## 2021 Tax Organizer

Preparer: \_\_\_\_\_

Date: \_\_\_\_\_

### Personal Information

	Name	Has IP PIN	Date of birth (NEW CLIENTS ONLY)
Taxpayer			
Spouse			

Street address, city, state, and ZIP

	Daytime phone	Evening phone	Cell Phone	Ok to Text?	Email
Taxpayer				Y / N	
Spouse				Y / N	

#### Filing status at the end of 2021

- Single   
  Married   
  Widowed - If widowed and your spouse died in 2021, enter the date of death \_\_\_\_\_  
 Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2021 \_\_\_\_\_

**Yes**   **No**   
 Did you receive the third stimulus payment (Economic Impact Payment or EIP) in 2021?  
      
 If "Yes," enter the amount received for each taxpayer and provide Notice 1444-C or Letter 6465 from the IRS.  
*NOTE: Be sure to include amounts for dependents on return in total.*  
 Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_

**Yes**   **No**   
 Did you receive advanced child tax credit payments in 2021? You must provide IRS Letter 6419 or create an IRS Portal Account or access your bank statements to verify amount. Note: *Any incorrect information about your Advance Child Credit amount can result in delayed or altered refunds.*  
      
 Total Payments Received: \_\_\_\_\_

### Identification Information

Did you or your spouse update/replace your driver's license this year? Please provide new issue date and expiration or select same if no change.

<p><b>Taxpayer's type of photo ID</b></p> <p> <input type="checkbox"/> Driver's license                    <input type="checkbox"/> State-issued photo ID                    <b>Same</b> <input type="checkbox"/> </p> <p>Photo ID number _____</p> <p>State photo ID was issued _____</p> <p>Date photo ID was issued _____</p> <p>Date photo ID expires _____</p>	<p><b>Spouse's type of photo ID</b></p> <p> <input type="checkbox"/> Driver's license                    <input type="checkbox"/> State-issued photo ID                    <b>Same</b> <input type="checkbox"/> </p> <p>Photo ID number _____</p> <p>State photo ID was issued _____</p> <p>Date photo ID was issued _____</p> <p>Date photo ID expires _____</p>
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### Account Information for Deposits and Withdrawals

Did you change your bank account information last year? Y or N Please confirm last four digits of bank account info: \_\_\_\_\_

Name of bank	Bank routing number	Bank account number	Type of account		Use this account for	
			Checking	Savings	Deposits	Withdrawals

**For Office Use Only**    Entered: \_\_\_\_\_    Reviewed: \_\_\_\_\_    Finalized: \_\_\_\_\_

NOTES: \_\_\_\_\_

529: \_\_\_\_\_    HSA Withdraw: \_\_\_\_\_    Daycare: \_\_\_\_\_    P.S. Tuition: \_\_\_\_\_    Residential Energy: \_\_\_\_\_