

Organizer

Tax Year _____

#1 - Primary

Failure to provide ALL requested can cause delays and/or increased fees in your tax preparation.

TAXPAYER NAME (AS IT APPEARS ON SOCIAL SECURITY CARD)	LAST: _____
	FIRST: _____
	MIDDLE: _____
	SOCIAL SECURITY#: _____

BIRTHDATE:	PROFESSION/OCCUPATION:		
ADDRESS:			APT#:
CITY:		STATE:	ZIP:
COUNTY:		School District (if required on state tax return):	

CONTACT INFORMATION	PRIMARY #:
	OTHER #:
	EMAIL:

ON DECEMBER 31, YOUR LEGAL STATUS WAS:	☐ SINGLE
	☐ MARRIED (If NOT filing Jointly, please advise)
	☐ WIDOW/ER
	☐ RDP
	☐ LEGALLY SEPARATED
If LEGALLY SEPARATED, did you live with your spouse at ANY time during the year? _____	

IF YOU GET A REFUND, YOU WILL RECEIVE DIRECT DEPOSIT	BANK NAME:		
	ROUTING (ABA) #:		
	ACCOUNT #:		
	ACCOUNT TYPE:	CHECKING	SAVINGS

☐ You MUST provide readable copy of your state issued picture ID/Driver License - front & back

☐ If your legal status on 12/31 was MARRIED, you MUST fill out ORGANIZER - SPOUSE

Do you want \$3 to go to the Presidential Election Campaign (will not change your tax or refund) ☐ NO YES ☐

Preface Information for Tax Preparation Worksheets

When filling out Organizer worksheets for your tax preparation, please note the following general instructions:

- **LEAVE THE LINE BLANK**
Unless otherwise directed, leave the line blank if you have nothing to report for any given line.
Do NOT enter any dash, slash, nor zero where you have no number to enter; make NO mark.
- **EXACT NUMBERS**
Use exact numbers that you will be able to defend, if you are audited.
Do not round your numbers; do not guess your numbers.
- **ONE-TIME USE ONLY**
Do not use the same number in more than one place unless directed to list that same number again.
 - Example: On your Expense for Business worksheet you list \$327 for Utilities. Do not then use that same \$327 for Utilities on the Home Office worksheet.
- **ENTIRE DOCUMENTS**
Do NOT separate your W-2s; we need ALL of the W-2s you received. Where you have received more than one page of a W-2 from an employer, we must see all of the pages of that W-2.
- **1-PAGE, 1-DOCUMENT**
Do NOT combine various documents on a page (even if they are the same type of document).
- **SINGLE SIDE ONLY**
When making copies, do not print on both sides of a page.
- **PDF FORMAT ONLY**
All material sent to us must be in PDF format only; no other format is allowed.
Always provide clear and legible PDFs of the entire document (all pages) of anything you send us.
 - **Check each PDF you create to ensure the margins did not cut off information from the original**
- **RECEIPTS**
Do **NOT** give us any receipts for any reason without first checking with us to see if we want the receipt.
If we decide we want to see a receipt, we will ask for it. **This includes receipts for charity - DO NOT SEND.**
 - **If in doubt, check first with your preparer before providing us with any receipt**
- **SIGNATURES**
Unless otherwise noted, any time you are required to provide your signature, your signature **must be a true and proper, legal, handwritten signature** sometimes referred to as a “wet signature.”
 - Do NOT use cut-n-paste signatures or use any type of “copy signatures”
 - In most cases you can use your mouse or stylus to write your signature
 - The IRS and some states allow for a “digital signature” for some forms. There are very specific rules regarding where a digital signature is allowed to what is a true and proper digital signature; in most instances a digital signature will cost money and require a multi-step verification process to provide a true legal digital signature.
- **UNLOCKED**
Do not lock, ZIP, compress any files you send us.
- **ALL AT THE SAME TIME**
Do not send us anything **until you can send us everything.** Sending material in pieces **will delay** the preparation of your return **and** *increase your invoice.*

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