Susan Does Taxes LLC
New Client Tax Organizer

Personal Information

	Name		SSN	Date of Birth
Taxpayer	*Last Name, First Name MI*		###-##-####	MM/DD/YYYY
Spouse	*Last Name, First Name MI*		###-##-####	MM/DD/YYYY
Address	*Street, City, ST ZIP*			

	Occupation	Email	Daytime Phone	Evening Phone	Cell Phone
Taxpayer			###-###-####	###-###-####	###-###-####
Spouse			###-###-####	###-###-####	###-###-####

Marital Status (as of December 31, 2023)

◯ Married ◯ Single ◯ Married Filing Separately
◯ Widow(-er); if spouse died in 2023, enter date of death: *MM/DD/YYYY*

Dependent Information

Full Name of Dependent	Relationship	Date of Birth	SSN	Months In Home	Disabled	Full-Time Student	Childcare Expenses
Last Name, First Name MI	*son/daughter/etc.*	*MM/DD/YYYY*	*###-##-####*	*#/12*	*Y/N*	*Y/N*	*$*
Last Name, First Name MI	*son/daughter/etc.*	*MM/DD/YYYY*	*###-##-####*	*#/12*	*Y/N*	*Y/N*	*$*
Last Name, First Name MI	*son/daughter/etc.*	*MM/DD/YYYY*	*###-##-####*	*#/12*	*Y/N*	*Y/N*	*$*
Last Name, First Name MI	*son/daughter/etc.*	*MM/DD/YYYY*	*###-##-####*	*#/12*	*Y/N*	*Y/N*	*$*
Last Name, First Name MI	*son/daughter/etc.*	*MM/DD/YYYY*	*###-##-####*	*#/12*	*Y/N*	*Y/N*	*$*

Dependents required to file a return:

Virtual Currency

◯ YES ◯ NO - At any time during 2023, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?

Account Information for Deposits/Withdrawals

Bank Name	Routing Number	Account Number	Checking?	Savings?	Use for Deposit?	Use for Withdrawal?
Primary Account	*############*	*############*	◯	◯	◯	◯
Secondar Account	*############*	*############*	◯	◯	◯	◯

Identification Information

Taxpayer Identification

Type of Photo ID	◯ Driver's License	◯ State-Issued Photo
ID Number		
State Issuing ID		
Issued Date	*MM/DD/YYYY*	*MM/DD/YYYY*
Expiration Date	*MM/DD/YYYY*	*MM/DD/YYYY*

Spouse Identification

Type of Photo ID	◯ Driver's License	◯ State-Issued Photo
ID Number		
State Issuing ID		
Issued Date	*MM/DD/YYYY*	*MM/DD/YYYY*
Expiration Date	*MM/DD/YYYY*	*MM/DD/YYYY*

Additional Information, Comments, or Questions?