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2022 NEW CLIENT TAX ORGANIZER WORKSHEET

Date information submitted _____

New Clients -We Need a copy of Driver's License for taxpayer and spouse.

Names

Taxpayer	Spouse
Filing Status: <input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Married-Filing Jointly <input type="checkbox"/> Married-Filing Separately <input type="checkbox"/> Claimed as a dependent on another return	
Social Security #	Social Security #
Birth Date	Birth Date
Occupation	Occupation

Current Address that will be on your tax return

Street Address	City	State	Zip
Primary Contact Telephone		Secondary Contact Telephone	
Email		Secondary Email	

Dependents

Full Name	Birth Date	Relationship	Social Security #
Full Name	Birth Date	Relationship	Social Security #
Full Name	Birth Date	Relationship	Social Security #
Full Name	Birth Date	Relationship	Social Security #

Yes/No Questions

Please check the appropriate box and include all the necessary details.

Yes **No**
 NEW CLIENT- Please include copy of Last Year's Tax Return

Dependent Information

 Were there any changes in dependents from the prior year?
If yes, please explain: _____

Purchases, Sales, and Debt Information

- Did you start a new business this year?
- Did you purchase rental property during the year?
- Did you acquire a new or additional interest in a partnership or S Corporation?
- Did you sell, purchase, or refinance any real estate during the year?
- Did you acquire or dispose of any stock during the year?
- Did you sell an existing business, rental, or other property this year?
- In 2022, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any Stock or Virtual currency?**

Income Information

- Did you make any withdrawals from a retirement account?
- Did you make any withdrawals from an education savings/529 Plan account?

Itemized Deduction Credits

- Did you make non-cash charitable contributions?
- Did you have any educational expenses during the year?
- Did you have any student loan interest?
- Any solar installed or purchase of alternative fuel vehicle?
- Any childcare expenses?

Miscellaneous Information

- Did you or any of your dependents have healthcare.gov medical insurance. If yes, please have your 1095A ready. (Obamacare)
- Did you have an HSA account? If yes amount of distribution _____
- Are all your documents printed and ready for this appointment?

Banking Information

FOR REFUNDS:

ROUTING NUMBER: _____

ACCOUNT NUMBER: _____

How do you want to receive your copy of the tax return?

Electronic (email) _____ **Paper Copy** _____ **USB** _____

Communication Preference:

Phone call _____ **Text Message** _____ **Email** _____