

# PERSONAL DATA TAX ORGANIZER

PLEASE REFERENCE & RETURN WITH YOUR DOCUMENTS

## Personal Information

We need a copy of a **government issued drivers' license** for you (& your spouse if applicable)  
 Many states are requiring drivers' license information to be submitted with tax returns to curb identity theft.

Name	SSN	Date of Birth	Phone Number	Email Address
Taxpayer		/ /		
Spouse				
Address:				

Marital Status (circle):    Single    Married\*    Separated\*    Divorced^^    Widowed\*    \*Date if changed during year \_\_\_\_\_  
 ^^ (date: / / ) required if receiving alimony

## Dependent Information

Please provide proof of residency for each dependent under 18 (a document with dependent's name and address)

Name	SSN	Date of Birth	Relationship	School Attended	Child Care Expenses	Income Filing tax return?
		/ /			\$	\$
		/ /			\$	\$
		/ /			\$	\$
		/ /			\$	\$

A dependent – must have lived with you for over 6 months (away at school counts as being with you) & be a full-time student or have non-tax exempt income less than \$4,050 & you must have provided over 50% of their support.

## Dependent Care Provider Expenses

(Important if paid with pre-tax benefits, the amount is on W-2, box 10 and we have to reconcile total amount spent)

Provider Name	Address	EIN	Amount Paid	Child's name
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	

## Estimated Tax Payments

	1st Q amount paid Date paid (April)	2nd Q amount paid Date paid (June)	3rd Q amount paid Date paid (Sep)	4th Q amount paid Date paid (Jan)
Federal				
State:				

## Banking Information

Bank Name	Routing Number (9 digits)	Account Number	Checking or Savings	Direct Deposit to this account		Direct Withdrawal from this account	
				Yes	No	Yes	No
				Yes	No	Yes	No

\$ \_\_\_\_\_ classroom expenses paid by educators in grades K-12

\$ \_\_\_\_\_ IRA contributions made during year      \$ \_\_\_\_\_ ROTH IRA contributions made during year