

## **CLIENT TAX ORGANIZER**

Please bring this printed and filled out form with you to your appointment or, you may save the filled out form and email it to taxprep@oltax.biz.

Name   Social Security#   Date of Birth   Occupation   Cell#   Taxpayer   Spouse   Street Address   City   State   Zip   Home Phone#   Email address(es)   On-line Tax will never sell, trade, give away, or spam your address.  2. Dependents   Name   Relationship   Date of Birth   Social Security#   Months   Eull-Time   Lived with You   Student v	1. Personal Information									
Spouse Street Address On-line Tax will never sell, trade, give away, or spam your address.  Con-line Tax will never sell, trade, give away, or spam your address.  2. Dependents Name (First, Last) Birth Social Security# Months Lived with You Student v  Social Security# Months Lived with You Student v  Full-Time Student v  At the YES box if you have it to bring with you. X the NO box if you do not.  YES NO Social Security Relationable Student v  Additional Items to Bring X the YES box if you have it to bring with you. X the NO box if you do not.  YES NO Social Security Relationable Student v  Additional Items to Bring X the YES box if you have it to bring with you. X the NO box if you do not.  YES NO Social Security Conduction Student v  Additional Items to Bring X the YES box if you have it to bring with you. X the NO box if you do not.  YES NO Social Security Conduction Student v  A the YES box if you have it to bring with you. X the NO box if you do not.  YES NO Social Security Conduction Security Additional Items to Bring X the YES box if you have it to bring with you. X the NO box if you do not.  YES NO Social Security Conduction Security Additional Items to Bring X the YES box if you have it to bring with you. X the NO box if you do not.  YES NO Social Security Conduction Security Conduction Security Additional Items to Bring X the YES box if you have it to bring with you. X the NO box if you do not.  YES NO Social Security Conduction Security Security Conduction Security Security Conduction Security Security Conduction Security		Name		Social Security#		Date of Birth	Occ	ıpation Cell#		
Email address(es)	Taxpayer .									
On-line Tax will never sell, trade, give away, or spam your address.  2. Dependents Name (First, Last)  Relationship Birth  Additional Items to Bring X the YES box if you have it to bring with you. X the NO box if you do not.  YES NO □ Last year's tax return (new clients only) □ Name and address label (from government booklet or card) □ W-2s □ Social Security (Cards (of each person & dependent) □ I.R.A. (Individual Retirement Account) □ Pension, Annuity Income (1099-R) □ Interest Income (1099-INT) □ Dividend Income (1099-B) & confirmation slips) □ Other Income (including non-taxable) □ Rental Income (1099-S & closing statements)	Spouse									
A Additional Items to Bring  X the YES box if you have it to bring with you.  X the NO box if you do not.  YES NO  □ Last year's tax return (new clients only) □ Name and address label (from government booklet or card) □ I.R.A. (Individual Retirement Account) □ Pension, Annuity Income (1099-INT) □ Dividend Income (1099-INT) □ Dividend Income (1099-INT) □ Dividend Income (1099-B & confirmation slips) □ Cher Income (including non-taxable) □ Rental Income (1099-S & closing statements)  Relationship Date of Social Security# Months Lived with You Social Security# Months Lived with You Full-Time Student V  Additional Items to Bring  X the YES box if you have it to bring with you.  X the NO box if you do not.  YES NO □ Medical/Dental Expenses □ Have YES box if you have it to bring with you.  X the NO box if you do not.  YES NO □ Medical/Dental Expenses □ Charitable Contributions □ Employment-related Expenses that you paid (Not Self-employed) □ Child & Other Dependent Care Expenses □ Investment-related Expenses		Street Address		City		State	Zip Home Phone#		Phone#	
2. Dependents   Name (First, Last)   Date of Birth   Social Security#   Months Lived with You   Student \( \nu \)     Additional Items to Bring   X the YES box if you have it to bring with you. X the NO box if you do not.  YES NO   Last year's tax return (new clients only)   Mame and address label (from government booklet or card)   W-2s   Mortgage Interest (from government Account)   Pension, Annuity Income (1099-R)   Interest Income (1099-INT)   Dividend Income (1099-B & confirmation slips)   Other Income (including non-taxable)   Rental Income (1099-S & closing statements)   Investments Sold (1099-S & closing statements)   Investment Income (1099-S & closing statements)   Investment I	Email address(es)									
Name (First, Last)  Relationship Date of Birth  Social Security# Months Lived with You Student   Additional Items to Bring  X the YES box if you have it to bring with you. X the NO box if you do not.  YES NO  Last year's tax return (new clients only)  Name and address label (from government booklet or card)  N-2s  Social Security Cards (of each person & dependent)  I.R.A. (Individual Retirement Account)  Pension, Annuity Income (1099-R)  Interest Income (1099-DIV)  Investments Sold (1099-B & confirmation slips)  Charliable Contributions  Employment-related Expenses that you paid (Not Self-employed)  Child & Other Dependent Care Expenses  Business Mileage  Investments Sold (1099-B & confirmation slips)  Cher Information:  Investment-related Expenses  Other Information:	On-line Tax will never sell, trade, give away, or spam your address.									
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YES NO  □ Last year's tax return (new clients only) □ Name and address label (from government booklet or card) □ W-2s □ Social Security Cards (of each person & dependent) □ I.R.A. (Individual Retirement Account) □ Pension, Annuity Income (1099-R) □ Interest Income (1099-INT) □ Dividend Income (1099-DIV) □ Investments Sold (1099-B & confirmation slips) □ Other Income (including non-taxable) □ Rental Income (1099-S & closing statements)  YES NO □ Medical/Dental Expenses □ Mortgage Interest □ Charitable Contributions □ Employment-related Expenses that you paid (Not Self-employed) □ Child & Other Dependent Care Expenses □ Business Travel □ Investment-related Expenses Other Information:	, , , , , , , , , , , , , , , , , , , ,					1				
□ Name and address label (from government booklet or card) □ Mortgage Interest   □ W-2s □ Charitable Contributions   □ I.R.A. (Individual Retirement Account) □ Employment-related Expenses that you paid (Not Self-employed)   □ Pension, Annuity Income (1099-R) □ Child & Other Dependent Care Expenses   □ Dividend Income (1099-INT) □ Business Mileage   □ Investments Sold (1099-B & confirmation slips) □ Investment-related Expenses   □ Other Income (including non-taxable) □ Investment-related Expenses   □ Child & Other Dependent Care Expenses   □ Investment-related Expenses   □ Other Information: □ Other Information:	·				· ·					
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□ W-2s       □ Charitable Contributions         □ I.R.A. (Individual Retirement Account)       □ Employment-related Expenses that you paid (Not Self-employed)         □ Pension, Annuity Income (1099-R)       □ Child & Other Dependent Care Expenses         □ Dividend Income (1099-DIV)       □ Business Mileage         □ Investments Sold (1099-B & confirmation slips)       □ Investment-related Expenses         □ Other Income (including non-taxable)       □ Investment-related Expenses         □ Other Income (1099-S & closing statements)       □ Other Information:	, , , , , , , , , , , , , , , , , , , ,					☐ ☐ Taxes Paid				
□ Social Security Cards (of each person & dependent)       □ I.R.A. (Individual Retirement Account)       □ Employment-related Expenses that you paid (Not Self-employed)         □ Pension, Annuity Income (1099-R)       □ Child & Other Dependent Care Expenses         □ Interest Income (1099-INT)       □ Business Mileage         □ Dividend Income (1099-DIV)       □ Business Travel         □ Investments Sold (1099-B & confirmation slips)       □ Investment-related Expenses         □ Other Income (including non-taxable)       □ Other Information:         □ Rental Income (1099-S & closing statements)       □ Other Information:	, -					☐ ☐ Mortgage Interest				
□ I.R.A. (Individual Retirement Account)       □ Child & Other Dependent Care Expenses         □ Interest Income (1099-INT)       □ Business Mileage         □ Investments Sold (1099-B & confirmation slips)       □ Investment-related Expenses         □ Investments Sold (1099-B & confirmation slips)       □ Investment-related Expenses         □ Other Income (including non-taxable)       □ Investment-related Expenses         □ Other Income (1099-S & closing statements)       Other Information:						☐ ☐ Charitable Contributions				
□ Pension, Annuity Income (1099-R)       □ Child & Other Dependent Care Expenses         □ Interest Income (1099-INT)       □ Business Mileage         □ Dividend Income (1099-DIV)       □ Business Travel         □ Investments Sold (1099-B & confirmation slips)       □ Investment-related Expenses         □ Other Income (including non-taxable)       □ Other Information:         □ Rental Income (1099-S & closing statements)       □ Other Information:	, , , , ,									
□ Interest Income (1099-INT)       □ Business Mileage         □ Dividend Income (1099-DIV)       □ Business Travel         □ Investments Sold (1099-B & confirmation slips)       □ Investment-related Expenses         □ Other Income (including non-taxable)       Other Information:         □ Rental Income (1099-S & closing statements)       Other Information:	`					☐ ☐ Child & Other Dependent Care Expenses				
<ul> <li>□ Investments Sold (1099-B &amp; confirmation slips)</li> <li>□ Other Income (including non-taxable)</li> <li>□ Rental Income (1099-S &amp; closing statements)</li> <li>□ Investment-related Expenses</li> <li>Other Information:</li> <li></li></ul>					l	☐ ☐ Business Mileage				
<ul> <li>□ Other Income (including non-taxable)</li> <li>□ Rental Income (1099-S &amp; closing statements)</li> </ul> Other Information:	☐ ☐ Dividend Income (1099-DIV)					☐ ☐ Business Travel				
□ □ Rental Income (1099-S & closing statements)	☐ ☐ Investments Sold (1099-B & confirmation slips)				☐ ☐ Investment-related Expenses					
	☐ ☐ Other Income (including non-taxable)				Other Information:					
□ □ Self-Employment Income (1099)	☐ ☐ Rental Income (1099-S & closing statements)									
	☐ ☐ Self-Employment Income (1099)									



