

2015 Tax Organizer Personal and Dependent Information

Personal Information

	Name	SSN	Date of Birth	Occupation	Healthcare coverage ALL year
Taxpayer					
Spouse					
	Daytime Phone	Evening Phone	Cell Phone	Email	
Taxpayer					
Spouse					
Street address, city, state, and ZIP					

Marital Status at end of 2015

- Married
 Married filing separately
 Single
 Widow(er), Date of Spouse's Death _____

Taxpayer

- Yes No
 Yes No
 Yes No
 Yes No

Spouse

- Yes No You are blind?
 Yes No You are disabled?
 Yes No You are a full-time student
 Yes No You want \$3 to go to the Presidential Election Camp Fund?

Dependent Information

First and last name	SSN	Relationship	Months in Home	Date of Birth	Disabled	Full-time Student	Required to file a return	Healthcare coverage ALL year

Child and Other Dependent Care Expenses

Name of care provider	Address	SSN or EIN	Amount Paid

Other Information

Information to bring to your appointment

- Copy of your 2014 income tax return
 All income statements (Forms W-2, 1098s, 1099s, etc.)
 All healthcare coverage statements (Forms 1095-A, 1095-B, 1095-C)

- Canceled checking or savings slip (for direct deposit or debit of refund or balance due)
 Documentation for proof of dependency for earned income credit (school records, medical records, daycare records, etc.)

Select all items that apply to you, your spouse, or dependent

- You can be claimed as a dependent by someone else
 If yes, explain _____
 Another person qualifies to claim any dependent listed above
 You have a child under 19 or a full-time student under 24 with more than \$1,900 of unearned income
 You are self-employed or received hobby income during 2015
 You received income from farming during 2015
 You received income from rental property during 2015
 You received income from timber, minerals, oil, gas, copyrights, etc. during 2015
 You have a financial interest in or signature authority over a financial account located in a foreign country during 2015
 You received a distribution from, were a grantor of, or transferor to a foreign trust during 2015

- You receive income from or pay taxes to a foreign country
 You sold a principal residence during 2015
 You foreclosed or abandoned a principal residence during 2015
 You had debts canceled or forgiven during 2015
 You engaged in a bartering transaction during 2015
 You gave a gift of more than \$14,000 to one or more people during 2015
 You paid student loan interest during 2015
 You paid tuition expenses required to attend classes beyond high school during 2015
 You incurred a loss due to damaged or stolen property during 2015
 You paid wages to a household employee during 2015
 You received a notice from IRS or a state taxing authority