



# KIM'S TAX SERVICE, LLC

## INCOME TAX ORGANIZER

Taxpayer's Name		Social Security Number		
Spouse's Name		Social Security Number		
Taxpayer's Occupation		Date of Birth	Blind? Yes or No	
Spouse's Occupation		Date of Birth	Blind? Yes or No	
Address		Email Address		
City	State	Zip	Home Phone	Cell Phone

### Dependent Children (who lived with you more than 6 months)

Name	Social Security No.	D.O.B.	Name	Social Security No.	D.O.B.
Name	Social Security No.	D.O.B.	Name	Social Security No.	D.O.B.

### Other Dependents

Name	Social Security No.	Time at Home	Relationship	Income	Supported by you?
Name	Social Security No.	Time at Home	Relationship	Income	Supported by you?

### THINGS TO BRING (IF APPLICABLE)

Last years tax return (if a new client)  
W-2 Form(s) for wages  
1099 Form(s) for interest, Dividends, Retirement, Social Security,  
Unemployment & Other Income  
**Amount of EIP (aka "stimulus") Received**  
IRA Year-end Statements  
K-1s from Partnerships, Corporations or Estates  
Cryptocurrency (e.g. Bitcoin ) Sales/ Earnings  
Business/ Rental/ Farm Income & Expenses  
Records of Estimated Taxes Paid  
HAS forms (1099-SA & 5498-SA)  
Childcare Provided Information

Property Tax Statements  
1098 Form(s) – Mortgage Interest,  
Tuition, 1098-T  
Student Loans Interest, 1098-E  
Closing Papers for Purchases & Sales (including Purchase and sales dates and amounts)  
All other Statements Showing Income  
Charitable Contributions Details  
Voided Check for Direct Deposit  
Forms 1095-A Health Insurance ONLY  
Copy of Driver's License for Taxpayer and Spouse  
Copy of Social for new members

<b>RENTAL/SELF-EMPLOYMENT/FARM INCOME</b> Landlords (rent received) \$ _____ Self-employment (total received) \$ _____ Farm-income (total received) \$ _____  <b>OTHER INCOME</b> Wages (Forms W2) \$ _____ Interest (forms 1099-INT) \$ _____ Dividends (forms 1099 DIV) \$ _____ Tips \$ _____ Child Care \$ _____ Retirement (forms 1099-R) \$ _____ Roth Conversions \$ _____ Jury Duty \$ _____ Election Judging \$ _____  <b>STIMULUS RECEIVED</b> \$1400.00 Per Person \$ _____	<b>OTHER INCOME (cont.)</b> Census Work ..... \$ _____ <b>EIP (stimulus) Received.....</b> \$ _____ Gambling Winnings.....\$ _____ <b>Unemployment (1099-G).....</b> \$ _____ Alimony Received..... \$ _____ Prizes/Awards.....\$ _____ Scholarships & Fellowships.....\$ _____ Debt Cancellation.....\$ _____ Partnerships & S-Corporations.. \$ _____ Estate & Trusts.....\$ _____ Social Security/RR Retirement...\$ _____ State Tax Refunds..... \$ _____ Royalties..... \$ _____ Sick Pay &/ or Disability.....\$ _____ Withdrawals from HAS/MSA... \$ _____ Hobby Income.....\$ _____ Cryptocurrency sales/ Earrings .\$. _____
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