

2025 Individual Taxpayer Organizer

Taxpayer					SS # *	
<i>First Name</i>		<i>M.I.</i>	<i>Last Name</i>		Email	
					IP PIN	
Occupation			Date of birth		Are you new to our firm? Yes No	
Address			City		State Zip	
County			Primary phone		Secondary phone	
Driver's License No.		State		Issue Date		Exp. Date

Spouse					Tax ID # *	
<i>First Name</i>		<i>M.I.</i>	<i>Last Name</i>		Email	
					IP PIN	
Occupation			Date of birth		Are you new to our firm? Yes No	
Address <small>(If different from Taxpayer)</small>			City		State Zip	
County			Primary phone		Secondary phone	
Driver's License No.		State		Issue Date		Exp. Date

If you moved during 2025, enter your previous address.					Date of move	
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Marital status on 12/31/25: Single Married Separated Surviving Spouse Registered Domestic Partnership (RDP)
 Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No
Note: Individuals in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.

Names of dependent children	SS # *	IP PIN	Date of birth	Months lived in home in 2025	Relationship	College student?
<i>Child's full name</i>						

Did any of the children have unearned income of \$1,350 or more? Yes No Do any of the children have a disability? Yes No
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2025? Yes No

Other dependents or people who lived with you						
<i>Name</i>	Tax ID # *	IP PIN	Date of birth	Months lived in home in 2025	Relationship	Income

Bank information: Use for Direct deposit of refund Direct debit of balance due *Name of bank*

<i>Checking</i>	<i>Savings</i>	<i>Routing transit number</i>	<i>Account number</i>
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Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.
 *A Tax ID # is a Social Security Number (SSN), adoption taxpayer identification number (ATIN), or an individual taxpayer identification number (ITIN).