



Tax Year _____ **Individual Tax Organizer**

This organizer will assist you in gathering information necessary for the preparation of your 2017 Individual Tax Return. Please enter all pertinent 2017 information and return to our office. Be sure to attach important tax documents

CLIENT INFORMATION

Taxpayer Name _____

Social Security Number _____

Date of Birth _____

Spouse Name _____

Social Security Number _____

Date of Birth _____

FILING STATUS please select only one

SINGLE _____

HEAD OF HOUSEHOLD _____

Widow _____

MARRIED FILING JOINT _____

MARRIED FILING SEPARATE _____

DEPENDENTS

Name

SSN

Date of Birth

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

