

INCOME TAX ORGANIZER

Smash Tax

25 Clearwater Ave Bagley, MN 56621 / 718 Bemidji Ave N Bemidji, MN 56601

(218) 694-2501

(218) 444-3224

(New Clients please bring a copy of your prior year return)

YOUR PERSONAL INFORMATION

Taxpayer:

Profession:

Filing Status:

Spouse:

Address:

Single
Married, Filing Jointly
Married, Filing Separately
Head of Household
Widow(er)

Taxpayer: Birth Date

SS#

Home Phone #

Spouse: Birth Date

SS#

Cell or Work #

DEPENDENTS - Please list names of all dependents, regardless of age, who received more than half of their support from you. Do not list spouse - **You must provide proof of residency to receive EIC**

Name of Dependents	Date of Birth	Social Security No.	Months in your home	Full Time Student? (5 months or more)

*** If any of your dependents are in college, we will need their 1098T and list of expenses

Direct Deposit: If you would like your refund direct deposited, Please provide bank info

Routing Number:

Account Number:

Did you make any estimated tax payments:

If yes, please list date, amount and to whom

Fed

MN

Did you take a retirement distribution in 2020 and spread it over three years?

Yes

No

Property Taxes:

Own: _____

County: _____

Rent: _____

Are you enrolled/live on a reservation?

(Circle One)

Yes

No

Reservation: _____

Please be sure to bring all tax documents to your tax appointment

We will need all W2, 1099, 1098, social security statements, interest statements, property tax statements, CRP, unemployment statements, investment income, gambling income/loss (W2G), daycare paid statements, dependent school expenses, medical expenses, and other itemized expenses.

If you do not have these documents, we will not be able to complete your appointment.