

# 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*

<b>Fed</b>	<b>MN</b>	
_____	_____	_____
_____	_____	_____
_____	_____	_____

**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.**