

# 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

<i>Taxpayer:</i>	<i>Profession:</i>	<input type="checkbox"/>	<i>Filing Status:</i> Single Married, Filing Jointly Married, Filing Separately Head of Household Widow(er)
<i>Spouse:</i>	<i>Spouse Profession:</i>	<input type="checkbox"/>	
<i>Address:</i>		<input type="checkbox"/>	
<i>Email Address:</i>		<input type="checkbox"/>	
		<input type="checkbox"/>	

<i>Taxpayer: Birth Date</i>	<input type="text"/>	<i>SS#</i>	<input type="text"/>	<i>Home Phone #</i>	<input type="text"/>
<i>Spouse: Birth Date</i>	<input type="text"/>	<i>SS#</i>	<input type="text"/>	<i>Cell or Work #</i>	<input type="text"/>

**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- Relationship	Date of Birth	Social Security No.	Months in your home	Student y/n	Relationship

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

### Direct Deposit: Please Provide Direct Deposit Information

<i>Routing Number:</i>	<input type="text"/>	checking
<i>Account Number:</i>	<input type="text"/>	savings

**Did you make any estimated tax payments:**

*If yes, please list date, amount and to whom*

<i>Fed</i>	<input type="text"/>	<i>MN</i>	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>

**Are you enrolled on a reservation?**

*(Circle One) Yes No*

*Reservation:* \_\_\_\_\_

**Do you live on a reservation?**

*(Circle One) Yes No*

*Reservation:* \_\_\_\_\_

### Property Taxes:

*Own:* \_\_\_\_\_ *County:* \_\_\_\_\_  
*Rent:* \_\_\_\_\_

### 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.**