

INCOME TAX ORGANIZER

Smash Tax

Bagley: 25 Clearwater Ave Bagley, MN 56621

Bemidji: 718 Bemidji Ave N Bemidji, MN 56601

Grand Rapids: 1003 S Pokegama Ave, Grand Rapids, MN 55744

(218) 444-3224

YOUR PERSONAL INFORMATION

Taxpayer:

Profession:

Spouse:

Profession:

Address:

Email Address:

Filing Status:

Single

Married, Filing Jointly

Married, Filing Separately

Head of Household

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- Relationship	Date of Birth	Social Security No.	Months in your home in 2024	Student y/n

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

Direct Deposit: Please Provide Direct Deposit Information

Routing Number:

checking

Account Number:

savings

Did you make any estimated tax payments:

If yes, please list date, amount and to whom

Fed

MN

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: _____

Do you want Advance payments of the

Child Tax Credit? Yes _____ No _____

Did you have interest in Digital Assets? Yes No

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.