

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: _____	<input type="checkbox"/>	Filing Status:
Spouse: _____	Profession: _____	<input type="checkbox"/>	Single
Address: _____		<input type="checkbox"/>	Married, Filing Jointly
Taxpayer Email: _____		<input type="checkbox"/>	Married, Filing Separately
Spouse Email: _____		<input type="checkbox"/>	Head of Household
		<input type="checkbox"/>	I would like to E-Sign my return

Taxpayer: Birth Date	<input type="text"/>	SS#	<input type="text"/>	Home Phone #	_____
Spouse: Birth Date	<input type="text"/>	SS#	<input type="text"/>	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 complete due diligence organizer**

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

*Did you receive advanced payments of the Child Tax Credit in 2025? Yes ____ No ____

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

Please provide bank information - the IRS is no longer issuing or accepting checks

Name of Bank: _____	<input type="text"/>	checking	If you owe tax, when would you like funds to be withdrawn from your account?
Routing Number: _____			Date _____
Account Number: _____	<input type="text"/>	savings	

****Bank information must be provided, we will not be responsible if not updated or provided**

Did you make any estimated tax payments: If yes, please list date, amount and to whom Fed _____ MN _____ _____ _____ _____	Do you work & live on a reservation that you are enrolled in? Yes ____ No ____ Reservation: _____
	Do you have interest in Digital Assets? Yes ____ No ____

Property Taxes: Own: _____ Physical Address: _____ County: _____ Rent: _____	Did you receive overtime or tips in 2025? Yes ____ No ____ If yes, provide final paystub of 2025
--	---

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.