MENDEN
ACCOUNTING & TAX SERVICE

CLIENT TAX ORGANIZER - TAX YEAR___________

Please complete organizer prior to your appointment time or dropping off your information.
Returning clients, please complete the personal information only if it changed from the previous year. Please write legibly.

PERSONAL INFORMATION

	Taxpayer	Spouse
Social Security number		
First name & initial		
Last name & suffix		
Occupation		
Date of birth		
Cell phone		
Work phone		
Address		
City, State, Zip		
Email address		
Driver's license ID#		
DL issue date		
DL expiration date		
DL state of issue		
Legally blind?	Y OR N	Y OR N
Disabled?	Y OR N	Y OR N

Marital/filing status? SINGLE MARRIED HEAD OF HOUSEHOLD WIDOWED

MARRIED FILE SEPARATELY Year of Spouse Death _______________

BANKING INFO
(FOR REFUND OR ACH PAYMENTS)

	ROUTING	ACCOUNT NUMBER	ACCOUNT TYPE
			Checking OR Savings

DAYCARE/CHILDCARE

CHILD	PROVIDER	ADDRESS	EIN or SSN	$$$ PAID

DEPENDENTS

1. NAME - first, intial, last | RELATIONSHIP | SSN

NAME - first, intial, last	RELATIONSHIP	SSN

BIRTHDATE	STUDENT/DISABLED	INCOME	MOS LIVED W/ YOU	GRADE IN SCHOOL	PUBLIC OR PRIVATE

2. NAME - first, intial, last | RELATIONSHIP | SSN

NAME - first, intial, last	RELATIONSHIP	SSN

BIRTHDATE	STUDENT/DISABLED	INCOME	MOS LIVED W/ YOU	GRADE IN SCHOOL	PUBLIC OR PRIVATE

3. NAME - first, intial, last | RELATIONSHIP | SSN

NAME - first, intial, last	RELATIONSHIP	SSN

BIRTHDATE	STUDENT/DISABLED	INCOME	MOS LIVED W/ YOU	GRADE IN SCHOOL	PUBLIC OR PRIVATE

INCOME AND DEDUCTION ITEMS - CIRCLE Y OR N; if Yes, then provide tax document….

Marital status change?	Y OR N	Jury Duty?	Y OR N	Medical expenses?	Y OR N
Address change?	Y OR N	Any 1099-Misc?	Y OR N	Mortgage Interest?	Y OR N
Dependents change?	Y OR N	Rental properties?	Y OR N	Property Taxes?	Y OR N
Dependent of another?	Y OR N	Self-employed?	Y OR N	Rent Certificate?	Y OR N
W-2's?	Y OR N	Work from home?	Y OR N	Charity?	Y OR N
State refund last year?	Y OR N	Health insurance all year?	Y OR N	Casualty Loss?	Y OR N
Interest or Dividends?	Y OR N	HSA account?	Y OR N	College Tuition?	Y OR N
Buy, sell investments?	Y OR N	IRA/SEP contributions?	Y OR N	Bankruptcy?	Y OR N
Unemployment?	Y OR N	IRA to ROTH conversion?	Y OR N	Gift $15K+?	Y OR N
Retirement distribution?	Y OR N	Student Loan Interest?	Y OR N	Foreign Banks?	Y OR N
Social Sec or Railroad?	Y OR N	Educator?	Y OR N	Live outside US?	Y OR N
K-1's?	Y OR N	Daycare?	Y OR N	Any tax notices?	Y OR N
Gambling?	Y OR N	Buy, sell, refinance home?	Y OR N	MN K12 expenses?	Y OR N
Alimony?	Y OR N	Repaying 1st time homebuyer credit?	Y OR N	529 Contributions?	Y OR N

ESTIMATED TAX PAYMENTS

	FEDERAL		STATE	
	$$$	Date Paid	$$$	Date Paid
Prior Year Carryover				
Q1 - April 15				
Q2 - June 15				
Q3 - September 15				
Q4 - December 15 or January Current Year				