



Personal Tax Organizer

FreeFinancial

In order to assist us in preparing a tax return that results in the largest allowable refund, it is important that you complete all of the questions that apply to you. The information in the highlighted areas is the minimum amount required to begin processing your Tax Return. Please print your answers legibly in ink and return all pages of this form with your tax documents and/or other information.

1 Personal Information

First and Last Name <i>(as it appears on your Social Security card)</i>		SSN	Date of Birth	Occupation
Taxpayer				
Spouse				
Street Address				Apt. No
City		State	Zip Code	
Home Phone ()		Work Phone ()	Cell Phone ()	
Email Address				
List all states in which you have lived or worked during the last year:				
Can you be claimed as a dependent on someone else's tax return?		Are you blind?		Are you disabled?
Do you want to contribute \$3 to the Presidential Campaign Fund?				
Taxpayer	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Spouse	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

2 Identity Verification

Government Issued Photo ID Number	Type	Issuer	Expiration Date
Taxpayer			
Spouse			

Note: Photo identification must be presented to the tax professional.

3 Marital Status

On December 31st, were you:

Single Married Divorced Separated Widowed Year Spouse Died:

If your Marital Status is Single, Separated or Widowed, did you pay over half of the cost of keeping up a home in which you and another person (other than a child) lived? Yes No

If you are divorced, legally separated or married but did not reside with your spouse the last 6 months of the year can you provide the IRS with:

(a) Divorce decree Separate Maintenance agreement Separation agreement

(b) Documents verifying your spouse did not live with you Yes No

(c) Documents verifying you paid more than half the cost of maintaining your home Yes No

(d) Did you receive any non-taxable support/income? Family Support Food Stamps Housing Assistance
Childcare Assistance Other

4 Military Personnel/Dependent Status

Are YOU and/or your SPOUSE a regular or reserve member of the Army, Navy, Marine Corps, Air Force, or Coast Guard serving on active duty under a call or order that does not specify a period of 30 days or fewer OR a dependent of a member of the armed forces on active duty as described above?

YES NO

5 Dependent Information

Dependent #1		
First Name:	Last Name(On SSN Card):	SSN:
Relationship(circle): Son Daughter Fosterchild Grandchild Grandparent Parent Brother Sister Aunt Uncle Nephew Niece None Other		
Number of months in home:	DOB:	Childcare expenses for the year: \$
Is this dependent unmarried OR married, can be claimed as your dependent and is NOT filing a joint return (except to claim a refund)? Yes <input type="checkbox"/> No <input type="checkbox"/>	Did this dependent live with you in the US for over half the year? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Could another person qualify to claim this dependent? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, dependent's relationship to other person:		
If the tiebreaker rules apply, would this dependent be treated as your qualifying child? Yes <input type="checkbox"/> No <input type="checkbox"/>		
1. If Dependent is a Full-Time College Student:		3. If Dependent is <u>not</u> your SON or DAUGHTER:
(a) Name of School:		(a) Where is the MOTHER?
(b) Can you provide documentation? Yes <input type="checkbox"/> No <input type="checkbox"/>		(b) Where is the FATHER?
2. If Dependent is Disabled:		(c) Foster Child—Placement letter or court document? Yes <input type="checkbox"/> No <input type="checkbox"/>
(a) Type of disability:		(d) Birth/marriage certificate verifying relationship? Yes <input type="checkbox"/> No <input type="checkbox"/>
(b) SSI or other disability payments? Yes <input type="checkbox"/> No <input type="checkbox"/>		4. Can you provide any of the following records/documentation to prove dependent lived with you for more than half the year? School <input type="checkbox"/> Medical <input type="checkbox"/> Letter <input type="checkbox"/> Social Service <input type="checkbox"/> Day Care <input type="checkbox"/>
(c) Letter from doctor or agency verifying disability? Yes <input type="checkbox"/> No <input type="checkbox"/>		

Dependent #2		
First Name:	Last Name(On SSN Card):	SSN:
Relationship(circle): Son Daughter Fosterchild Grandchild Grandparent Parent Brother Sister Aunt Uncle Nephew Niece None Other		
Number of months in home:	DOB:	Childcare expenses for the year: \$
Is this dependent unmarried OR married, can be claimed as your dependent and is NOT filing a joint return (except to claim a refund)? Yes <input type="checkbox"/> No <input type="checkbox"/>	Did this dependent live with you in the US for over half the year? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Could another person qualify to claim this dependent? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, dependent's relationship to other person:		
If the tiebreaker rules apply, would this dependent be treated as your qualifying child? Yes <input type="checkbox"/> No <input type="checkbox"/>		
1. If Dependent is a Full-Time College Student:		3. If Dependent is <u>not</u> your SON or DAUGHTER:
(a) Name of School:		(a) Where is the MOTHER?
(b) Can you provide documentation? Yes <input type="checkbox"/> No <input type="checkbox"/>		(b) Where is the FATHER?
2. If Dependent is Disabled:		(c) Foster Child—Placement letter or court document? Yes <input type="checkbox"/> No <input type="checkbox"/>
(a) Type of disability:		(d) Birth/marriage certificate verifying relationship? Yes <input type="checkbox"/> No <input type="checkbox"/>
(b) SSI or other disability payments? Yes <input type="checkbox"/> No <input type="checkbox"/>		4. Can you provide any of the following records/documentation to prove dependent lived with you for more than half the year? School <input type="checkbox"/> Medical <input type="checkbox"/> Letter <input type="checkbox"/> Social Service <input type="checkbox"/> Day Care <input type="checkbox"/>
(c) Letter from doctor or agency verifying disability? Yes <input type="checkbox"/> No <input type="checkbox"/>		

Dependent #3					
First Name:		Last Name(On SSN Card):		SSN:	
Relationship(circle): Son Daughter Fosterchild Grandchild Grandparent Parent Brother Sister Aunt Uncle Nephew Niece None Other					
Number of months in home:		DOB:	Childcare expenses for the year: \$		
Is this dependent unmarried OR married, can be claimed as your dependent and is NOT filing a joint return (except to claim a refund)? Yes <input type="checkbox"/> No <input type="checkbox"/>			Did this dependent live with you in the US for over half the year? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Could another person qualify to claim this dependent? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, dependent's relationship to other person:					
If the tiebreaker rules apply, would this dependent be treated as your qualifying child? Yes <input type="checkbox"/> No <input type="checkbox"/>					
1. If Dependent is a Full-Time College Student:			3. If Dependent is <u>not</u> your SON or DAUGHTER:		
(a) Name of School:			(a) Where is the MOTHER?		
(b) Can you provide documentation? Yes <input type="checkbox"/> No <input type="checkbox"/>			(b) Where is the FATHER?		
2. If Dependent is Disabled:			(c) Foster Child—Placement letter or court document? Yes <input type="checkbox"/> No <input type="checkbox"/>		
(a) Type of disability:			(d) Birth/marriage certificate verifying relationship? Yes <input type="checkbox"/> No <input type="checkbox"/>		
(b) SSI or other disability payments? Yes <input type="checkbox"/> No <input type="checkbox"/>			4. Can you provide any of the following records/documentation to prove dependent lived with you for more than half the year?		
(c) Letter from doctor or agency verifying disability? Yes <input type="checkbox"/> No <input type="checkbox"/>			School <input type="checkbox"/> Medical <input type="checkbox"/> Letter <input type="checkbox"/> Social Service <input type="checkbox"/> Day Care <input type="checkbox"/>		

Please indicate if sheets attached for additional Dependents

6 Childcare Provider Information

If you paid childcare expenses while you were working or going to school, please complete					
Provider #1 Name:			Provider #2 Name:		
Address:			Address:		
City:	State:	Zip:	City:	State:	Zip:
Provider EIN or SSN:			Provider EIN or SSN:		
Amount Paid to this Provider: \$			Amount Paid to this Provider: \$		

7 Income and Deduction Information

If you or anyone in your home received any of the following, indicate the number of forms received:					
Form	Type	# of Forms	Form	Type	# of Forms
W-2	Wage Income		1099-MISC	Self-Employment	
W-2G	Gambling Income		1099-R	IRA/401K Distribution	
1099-B	Sale of stocks or Bonds		1099-SSA	Social Security Income	
1099-DIV	Dividend Income		1098	Mortgage Interest	
1099-G	Unemployment Income		1098-E	Student Loan Interest	
1099-INT	Interest Income		1098-T	Tuition Expense	
If you RECEIVED Alimony, how much:			If you PAID Alimony, how much:		
Other Income not listed :			Did you pay any Medical or Dental Expenses*? Yes <input type="checkbox"/> No <input type="checkbox"/>		
If you (or your spouse) have self-employed income:					
(a) How long have you owned your business:			(b) Can you provide documentation for your business? Yes <input type="checkbox"/> No <input type="checkbox"/>		
(c) Who maintains the business records:			(d) Are separate business accounts maintained? Yes <input type="checkbox"/> No <input type="checkbox"/>		
(e) Do you have any 1099-MISC to support the income? Yes <input type="checkbox"/> No <input type="checkbox"/>			(f) Other info:		

*Please use the Schedule ACE Attestation to enter income and/or expenses

8 Earned Income Credit (EIC) Due Diligence Information

Who provided the information on this Interview Form? Taxpayer Spouse Agent with Power of Attorney

Was the Taxpayer a nonresident alien for any part of the year? Yes No

Was your main home, and the main home of your spouse if filing jointly, in the U.S. for more than half the year? Yes No

Has your EIC ever been reduce or disallowed? Yes No

Do you, your spouse or dependent(s) have a Social Security Card with "not valid for employment" printed on it? Yes No

9 Comments and Questions

9 Signature(s) and Declaration

I (we) declare that I (we) have provided and reviewed the above information and to the best of my (our) knowledge and belief, it is true, correct and complete.

Taxpayer Signature:

Date:

Spouse Signature:

Date:



1 Schedule A – Itemized Deductions

Medical and Dental Expenses		Taxes		Interest	
Insurance Premiums	\$	State/Local	\$	Mortgage(on Form 1098)	\$
Prescriptions	\$	Real Estate	\$	Points (on Form 1098)	\$
Eyeglasses/ Other Devices	\$	Personal Property	\$	Mortgage (not on Form 1098)	\$
Co-Pays	\$	Other (List type and amount)	\$	Points(not on Form 1098)	\$
Medical Equipment	\$		\$	Mortgage Insurance Premiums	\$
Medical Miles	\$		\$	Investment	\$
Charitable Gifts		Unreimbursed Employee Expenses		Other Miscellaneous Deductions	
Cash/Check	\$	Travel	\$	Tax Preparation Fees	\$
Other Than Cash/Check	\$	Auto/Transportation	\$	Safe Deposit Box	\$
Other (Type and Amount)	\$	Meals	\$	Other(List type and amount)	\$
	\$	Entertainment	\$		\$
	\$	Uniforms	\$		\$
	\$	Union Dues	\$		\$
Casualty and Theft Losses		\$			

*Must be able to provide written proof for all cash deductions.

2 Schedule C – Self Employment

3 Schedule E – Rental/ Royalty

Total Schedule C Income		\$		Total Schedule E Income		\$	
Expenses				Expenses			
Advertising	\$	Repair/Maintenance	\$	Advertising	\$	Interest	\$
Auto/Travel	\$	Supplies	\$	Auto/Travel	\$	Repairs	\$
Depreciation	\$	Taxes/Licenses	\$	Maintenance	\$	Supplies	\$
Insurance	\$	Meals/Entertainment	\$	Commissions	\$	Taxes	\$
Interest	\$	Utilities	\$	Insurance	\$	Utilities	\$
Legal/Professional	\$	Wages	\$	Legal/Professional	\$	Other Expenses	\$
Rent/Lease	\$	Other Expenses	\$	Management Fees	\$	Depreciation	\$

Attestation

The figures/amounts above were submitted/furnished by me (us) to the tax preparer. I (we) have reviewed the information and to the best of my (our) knowledge and belief, it is accurate, true, correct, and complete. The tax preparer has made me aware that the IRS may require me to provide proof for all the items listed above and other items on my tax return and, if needed, I will be able to provide proof of this information to the IRS.

Taxpayer Signature: _____

Date: _____

Spouse Signature: _____

Date: _____