

ALL SEASON TAX CENTER, INC

430 W Warner Rd, Ste 122

Tempe, AZ 85284

(480)968-7202

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PERSONAL INCOME TAX ORGANIZER

Bring a printed copy of the following documents and information

1. Copy of your previous year's tax return (if you are a new client)

2. HEALTH INSURANCE DOCUMENT - FORM 1095-A, 1095-B OR 1095-C

3. Original copies of all **W2s, 1099s** (self employment, interest, dividends), **1098s** (mortgage interest)

4. Copies of **K-1s** for partnerships, S Corporations, estates, or trusts

5. Information regarding cost basis for any assets sold (real estate, investments)

6. **CLOSING DISCLOSURES** (Settlement Statements) for the purchase, sale or refinance of real estate

7. **Dependent Information:** Social Security Card & 2 Documents showing child lived with you

8. Dependent Care Expenses: **Name, Address, Tax ID Number of Provider & Amount Paid**

9. Worksheets and any supporting documents (completed and printed)

10. Bank information Name of Bank, Account Number and Routing Number

FEDERAL ESTIMATED TAX PAYMENTS

STATE ESTIMATED TAX PAYMENTS

Date _____ Amount _____

Date _____ Amount _____

Date _____ Amount _____

Date _____ Amount _____

Date _____ Amount _____

Date _____ Amount _____

Date _____ Amount _____

Date _____ Amount _____

Taxpayer

Spouse

Name

Address

Social Security No

Date of Birth

Occupation

Home Telephone

Cellular

Work Phone

Email Address

Drivers License Information (If new state, or Renewed -**need the new issue and expired dates**)

States in which you lived and/or worked _____

Date of Move (if you moved) _____

PRINT ALL FORMS AND WORKSHEETS *PRIOR* TO YOUR APPOINTMENT