

# Individual Income Tax Organizer

LBS Tax  
 3277 W Stephens Pl  
 Chandler, AZ 85226  
[www.LBStax.com](http://www.LBStax.com)

Portal Password -8 char 1 num

<b>Name of Taxpayer</b>		
First M.I. Last (as name appears on Social Security card)		
Email		SS#
Occupation	Date of birth / /	Are you new to our firm? <b>Y N</b>
Address	Home	How did you hear of us?
City, State, Zip	Cell	Work

<b>Name of Spouse</b>		
First M.I. Last (as name appears on Social Security card)		SS#
Email		
Occupation	Date of birth / /	Are you new to our firm? <b>Y N</b>
<i>(Enter information below if different from Taxpayer)</i>		
Address	Home	
City, State, Zip	Cell	Work
Have you moved <b>Y N</b>		Date moved / /

Filing status:      Single                      Married Filing Jointly      Married Filing Separately      Widow (er)      Head of Household

Were you divorced or separated during the year?                      **Y N**                      Were there any deaths in the family?                      **Y N**

Have you received any notices from the IRS or state revenue department within the past year?                      **Y N**

Name of children or other dependents <i>Name</i>	Social Security #	Date of Birth	Months lived in home	Relationship	College Student?

Could a different taxpayer claim a child listed above as their dependent for tax year? **Y N**                      Who?

Did any of the children have income above \$900 for the year?                      **Y N**                      Are any children disabled?                      **Y N**

Bank account information for Direct Deposit of Direct Debit		Bank Name:	
Checking      Savings	Routing number	Account number	

Do you expect to owe taxes? **Y N**                      If you have a balance due, what day would you like it debited from your account?

**Ask your tax preparer for information about depositing a refund into an IRA account or split the deposit into more than one account.**