

## Client Tax Organizer



**Maheswari Shanmugam**  
 9716 Bloomfield Ave, Cypress, CA 90630  
 Tel: 714-602-6560  
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[www.technotax.net](http://www.technotax.net)  
 Bond #: 106824130 / [www.ctec.org](http://www.ctec.org)

<b>Taxpayer Information</b>			
First Name:		Last Name:	
Date of Birth:		SSN/ITIN :	
Address (US Address):			
Address:(Foreign Address residing outside US):			
Phone No 1:		Email 1:	
Phone No 2:		Email 2:	
<b>Spouse Information</b>			
First Name:		Last Name:	
Date of Birth:		SSN/ITIN :	
<b>Dependent Information</b>			
First Name	Last Name	Date of Birth	SSN/ITIN

<b>Health Insurance (Proof of health insurance coverage )</b>			
Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)			
Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)			
Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)			
<b>Last year Tax copy (if you are new client)</b>			
<b>Driver License or State ID (for both you and your spouse)</b>			
<b>Bank Information (for refunds or debit of taxes)</b>			
BANK NAME:	ROUTING NO:	ACCOUNT NO:	CHECKING SAVINGS
ACCOUNT OWNERS NAME:			
<b>Estimated Taxes</b>	<b>Q1 (Jan 1- Apr 17)</b>	<b>Q2 (Apr 18 – June 15)</b>	<b>Q3 (June 16- Sept 17)</b>
<b>Federal</b>	\$	\$	\$
<b>State</b>	\$	\$	\$
<b>Foreign taxes paid (if any) \$</b>			

<b>Sources of Income from US &amp; Outside US (Worldwide income should be reported)</b>		
	<b>United States</b>	<b>Worldwide Income</b>
<b>Employed</b>	Forms W-2	Salary \$
<b>Unemployed</b>	Unemployment / Paid family Leave - 1099 G	
<b>Self-Employed</b>	Form 1099 Business Income	Business Income \$
	Schedules K-1	Partnership \$

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Savings & Investments or Dividends	
United States	Worldwide Income
Interest Income 1099-INT	Interest Income \$
Dividend Income 1099-DIV	Dividend Income \$
Income from sales of stock 1099-B	Stock Sales \$
Retirement Income - 1099 R	Retirement Income \$
Income from sales of other property 1099-S	Home Sale \$
Rental Income (Attach worksheet)	Rental Income \$
Other	Other \$
Other Income & Losses	
United States	Worldwide Income
Health savings account 1099 -SA	Other \$
1099 SAA -Social Security	
State tax refund 1099 -G	
Gambling Income & Losses w2 G	
1099 MISC	
Jury duty records	
Prizes & Awards	
Hobby & Expenses	
Retirement & Other Savings	
Traditional IRA \$	ROTH IRA \$
SEP IRA \$	Non Deductible IRA \$
HSA \$	
Educator Expenses	
Receipts for classroom expenses (for educators in grades K-12)	
Educational Expenses	
Forms 1098-T from educational institutions	Records of any scholarships or fellowships you received
Receipts that itemize qualified educational expenses	Form 1098-E if you paid student loan interest
Childcare Expenses	
Attach Final summary for fees paid to school or individual	
Fees paid to a licensed day care center or family day care for care of an infant or preschooler	
Medical Expenses (Must exceed 7.5 % of your adjusted gross income)	
Amounts paid for healthcare insurance and to doctors, dentists, hospitals	
State & Local Taxes	
Amount of state/local income taxes paid	\$
Invoice showing amount of vehicle sales tax paid & DMV fees	\$

