

**PERSONAL INFORMATION:**

<b>Primary Taxpayer</b>															
Name	_____														
Social Security #	_____														
Address	_____														
	_____														
Date of Birth	_____														
Occupation	_____														
<b>Contact Information:</b>															
telephone 1	_____														
telephone 2	_____														
email	_____														
<b>Secondary Taxpayer (only if different from Primary)</b>															
Name	_____														
Social Security #	_____														
Address	_____														
	_____														
Date of Birth	_____														
Occupation	_____														
<b>Contact Information:</b>															
telephone 1	_____														
telephone 2	_____														
email	_____														
<b>Is the taxpayer and/or spouse ....</b>															
	<b>Primary</b>	<b>Secondary</b>													
Blind	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> </table>	Yes	No	Yes	No	Yes	No	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> </table>	Yes	No	Yes	No	Yes	No	
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Filing Separately	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> </table>	Yes	No	Yes	No	Yes	No	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> <tr><td style="width: 50%; text-align: center;">Yes</td><td style="width: 50%; text-align: center;">No</td></tr> </table>	Yes	No	Yes	No	Yes	No	
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<b>Direct Deposit / Withdrawal Information</b>															
Owner of Account	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 100%; text-align: center;">Primary</td></tr> <tr><td style="width: 100%; text-align: center;">Checking</td></tr> <tr><td style="width: 100%; text-align: center;">ROTH</td></tr> <tr><td style="width: 100%; text-align: center;">HAS</td></tr> </table>	Primary	Checking	ROTH	HAS	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 100%; text-align: center;">Secondary</td></tr> <tr><td style="width: 100%; text-align: center;">Savings</td></tr> <tr><td style="width: 100%; text-align: center;">MSA</td></tr> <tr><td style="width: 100%; text-align: center;">SEP</td></tr> </table>	Secondary	Savings	MSA	SEP	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 100%; text-align: center;">Joint</td></tr> <tr><td style="width: 100%; text-align: center;">IRA</td></tr> <tr><td style="width: 100%; text-align: center;">Coverdale</td></tr> <tr><td style="width: 100%; text-align: center;">OTHER</td></tr> </table>	Joint	IRA	Coverdale	OTHER
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IRA															
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Name of Financial Institution	_____														
Routing Number	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 12.5%; height: 20px;"> </td> <td style="width: 12.5%;"> </td> <td style="width: 12.5%;"> </td> <td style="width: 12.5%;"> </td> <td style="width: 12.5%;"> </td> <td style="width: 12.5%;"> </td> <td style="width: 12.5%;"> </td> <td style="width: 12.5%;"> </td> <td style="width: 12.5%;"> </td> <td style="width: 12.5%;"> </td> </tr> </table>														
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Dependent Information

	<b>First Name</b>	<b>Last Name*</b>	<b>Relationship</b>	<b>Date of Birth</b>	<b>Disabled and/or Student</b>	<b>Gross Income**</b>
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

\* If different from parents last name

\*\* If greater than \$5000.00 annually

Please answer the following to determine proper reporting of income and expenses:

	Primary		Secondary	
	Yes	No	Yes	No
For any part of the year was any taxpayer self-employed?	Yes	No	Yes	No
Did any taxpayer receive a 1099-Misc?	Yes	No	Yes	No
Did any taxpayer generate income from hobby activities?	Yes	No	Yes	No
Did any taxpayer generate income from activities involving animals, livestock or agriculture?	Yes	No	Yes	No
Did any taxpayer generate income from real estate or rental activities?	Yes	No	Yes	No
Did any taxpayer generate income from royalties, patents, copyrights or other intellectual properties?	Yes	No	Yes	No
Did any taxpayer generate income from mineral or other land-use activities?	Yes	No	Yes	No
Did any taxpayer generate income from gambling or lottery winnings?	Yes	No	Yes	No
Did any taxpayer generate income from inheritance?	Yes	No	Yes	No
Did any taxpayer generate income from the cancelation of any debt?	Yes	No	Yes	No
Did any taxpayer generate income from any other source not indicated elsewhere in this organizer?	Yes	No	Yes	No

Explanation: \_\_\_\_\_

At any time during the calender year was a distribution taken from a stock or mutual fund?	Yes	No	Yes	No
At any time during the calender year was a foreign bank account held under your name?	Yes	No	Yes	No
At any time during the calender year did you provide a home (or help support) anyone not listed as a dependent?	Yes	No	Yes	No
At any time during the calender year did you receive correspondence from the IRS, state tax agency, or other government agency?	Yes	No	Yes	No
At any time during the calender year was rent paid to secure a primary residence?	Yes	No	Yes	No
At any time during the calender year did you incur costs for educational activities or enrollments?	Yes	No	Yes	No
At any time during the calender year did you make payments toward student loans?	Yes	No	Yes	No
At any time during the calender year did your give a gift in excess of \$13,000 to an individual (either in full or in part)?	Yes	No	Yes	No
At any time during the calender year were there any births, deaths, marriages, divorces, adoptions or changes to your family structure that would effect this current tax return?	Yes	No	Yes	No
At any time during the calender year did you have any children under the age of 19 (23 if a full time student) with interest/investment income in excess of \$950?	Yes	No	Yes	No
At any time during the calender year did you purchase an energy efficient, or hybrid vehicle?	Yes	No	Yes	No
At any time during the calender year did you install energy efficient equipment or improve existing equipment for energy efficiency?	Yes	No	Yes	No

Explanation: \_\_\_\_\_

Income Checklist

**The following are the documents that I (we) the taxpayer(s) are providing to Money Breeders Tax & Accounting Inc. for the preparation of our tax return for the year in question. To the best of our ability and knowledge these are all the documents we have that need to be disclosed to accurately disclose our income and deductions.**

Category	Number of Documents	
	Primary	Secondary
Wages and Salaried Income:      W2s		
Interest Income:                      Statements of Interest Earned		
Dividend Income:                      Statements of Dividends Issued		
Investment Transactions:              Brokerage Statement of Proceeds		
	Statement of Basis of Investment	
Retirement/Pension Income:        1099-Rs (including railroad retirement)		
	Social Security Statements Received	
Business Income:                      Profit & Loss Statements		
	Balance Sheets	
	Statements of Income	
	Expense Reports	
	1099s received	
Corporate, Estate, Partnership and/or Trust Income:      K1s Issued		
Property Sold                              1099s received		
	Escrow or other statement of sale	
	Escrow or other statement of purchase	
Other Income:		
Alimony Received                      Statements Included		
Child Support                            Statements Included		
Scholarships/Grants                    Statements Included		
Unemployment                          Statements Included		
Awards, Bonuses, Prizes                Statements Included		
Gambling or Lottery                      Statements Included		
Tips, unreported                         Statements Included		
Director or Executor Fees                Statements Included		
Commissions                             Statements Included		
Jury Pay                                    Statements Included		
Workers' Compensation                  Statements Included		
Disability Benefits                        Statements Included		
Veteran Benefits                         Statements Included		
Prior Installment Sale Pymts            Statements Included		
State Tax Refunds                        Statements Included		
Other: _____		
_____		
_____		
_____		
_____		



**To the best of my knowledge the information enclosed and disclosed in this client tax organizer is correct and includes all income, deductions, and other information necessary for the proper preparation of the year's income tax returns for which I have adequate records to support if so notified by the taxation agencies.**

**I am aware that although Money Breeders Tax & Accounting Inc. has thoroughly reviewed all materials and components, both physical and verbal, and has applied, as well as offered, all tax theory that relates to my current year tax returns that I am responsible for all documentation that may be requested in the future to validate any and all information of this year's return, whether or not Money Breeders Tax & Accounting Inc. has retained copies for its own records.**

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Signature of Primary Taxpayer

Date

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Signature of Secondary Taxpayer

Date

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Signature of Money Breeders Tax & Accounting Inc. Preparer

Date