



## INDIVIDUAL TAX ORGANIZER

This form is designed to assist the user in gathering the pertinent information needed to have Etrends Group prepare their individual tax return. Though it covers the majority of tax items required for the return, the user may find some adaption to their particular tax situation is required. In addition, while this form may help the user discover additional tax deductions that may save them money, this form in no way guarantees tax savings or reduced tax liability.

### Section 1: Personal Information

	Last Name	First Name	M.I.	Birthdate	SSN	U.S. Citizen
Taxpayer						
Spouse						
Street Address		City			State	Zip Code
Home Phone:		Cell Phone:		Email:		

### Section 2: Dependents (Children and Relatives)

Name (First, Last)	Relationship	SSN	Birthdate

### Section 3: Income

Provide copies of the following items:

- All copies of W-2 forms
- All 1099 forms received (1099-INT, 1099-DIV, 1099-SSA, 1099-R, 1099-MISC, Etc.)
- Any HUD-1 forms for real estate
- Sales from stock and mutual funds (name, number of shares, date purchased, cost, date sold, amount)
- Miscellaneous income (awards, gambling, proceeds, jury pay, alimony, etc.)