

TAX ORGANIZER - PAGE 1

FIRST NAME _____ MIDDLE INITIAL _____ LAST NAME _____

SCHOOL _____ VISA _____

ADDRESS (INCLUDING CITY, STATE, ZIP CODE) _____

E-MAIL ADDRESS _____ TELEPHONE NUMBER _____

SOCIAL SECURITY NUMBER _____ DATE OF BIRTH _____

OCCUPATION _____ NUMBER OF DAYS IN US IN 2017 _____

SPOUSE : FIRST NAME _____ LAST NAME _____

SPOUSE SOCIAL SECURITY NUMBER _____ DATE OF BIRTH _____

DEPENDENTS (CHILDREN & OTHERS) (PROVIDE FIRST & LAST NAME, RELATIONSHIP, DATE OF BIRTH, SOCIAL SECURITY NUMBER, & NUMBER OF MONTHS LIVED WITH YOU IN 2017 IN USA _____

ESTIMATED TAXES PAID FOR 2017 INCLUDING DATE PAID, AMOUNT PAID, TO WHICH GOVERNMENT PAID (IF ANY) _____

TAX REFUND DIRECT DEPOSIT: ACCOUNT TYPE (CHECKING OR SAVINGS) _____

NAME OF BANK _____ ROUTING # _____ ACCOUNT # _____

IF A RESIDENT FOR TAX PURPOSES: DURING 2017, DID YOU HAVE A FINANCIAL INTEREST IN OR SIGNATURE AUTHORITY OVER A FINANCIAL ACCOUNT IN A FOREIGN COUNTRY? _____. IF YES, TOTAL VALUE OF ALL ACCOUNTS _____. IF OVER \$10000, SEE ** BELOW

PLEASE READ THE FOLLOWING THEN SIGN AND DATE BELOW. THEN UPLOAD THIS PAGE & THE SIGNED ENGAGEMENT LETTER, ALONG WITH YOUR W-2'S, 1042-S, 1098-e, 1099'S, AND A COPY OF YOUR 2016 FEDERAL AND STATE TAX RETURNS IF YOU FILED. SEE "HOW TO ORDER" PAGE @ WWW.ENGLERCPA.COM.

**** THROUGH THIS WEBSITE SERVICE, WE DO NOT HAVE PRESET PRICING TO PREPARE TAX RETURNS THAT HAVE THE FOLLOWING TYPES OF INCOME OR DEDUCTIONS BECAUSE MOST INTERNATIONAL STUDENTS & SCHOLARS DO NOT HAVE THE FOLLOWING TYPES OF INCOME AND EXPENSES: SELF-EMPLOYMENT INCOME AND EXPENSES, RENTAL PROPERTY INCOME, ROYALITIES, SOCIAL SECURITY OR DISABILITY INCOME, CANCELLATION OF DEBT INCOME, GAINS OR LOSSES FROM SALES OF STOCK, MORTGAGE INTEREST, CHARITABLE CONTRIBUTIONS, MEDICAL EXPENSE DEDUCTION, MISCELLANEOUS ITEMIZED DEDUCTIONS, INDIVIDUAL RETIREMENT ACCOUNTS CONTRIBUTIONS OR DISTRIBUTIONS, PENSION OR ANNUITY INCOME, ENERGY CREDITS, PROPERTY TAX DEDUCTION, CHILD AND DEPENDENT CARE EXPENSES, OR FOREIGN ASSET REPORTING IF VALUE OF ASSETS EXCEEDS \$10000. IF YOU HAVE ANY OF THESE TYPES OF INCOME, DEDUCTIONS, OR FOREIGN ASSETS, WE WOULD BE VERY PLEASED TO HELP YOU. PLEASE CONTACT OUR OFFICE VIA E-MAIL TO GARY@ENGLERCPA.COM FOR A CUSTOM FEE QUOTE.**

TO THE BEST OF MY KNOWLEDGE THE INFORMATION CONTAINED IN THIS ORGANIZER & THE INFORMATION SUBMITTED ELECTRONICALLY TO GARY R. ENGLER & COMPANY IS CORRECT AND INCLUDES ALL INCOME, DEDUCTIONS, & OTHER INFORMATION NECESSARY FOR THE PREPARATION OF THIS YEAR'S TAX RETURNS FOR WHICH I HAVE ADEQUATE RECORDS. PLEASE SIGN AND DATE HERE:

TAXPAYER

DATE

SPOUSE

DATE