

TAX ORGANIZER - PAGE 1

FIRST NAME _____ MIDDLE INITIAL _____ LAST NAME _____

SCHOOL _____ VISA _____

ADDRESS (INCLUDING CITY, COUNTY, STATE, ZIP CODE) _____

E-MAIL ADDRESS _____ TELEPHONE NUMBER _____

SOCIAL SECURITY NUMBER _____ DATE OF BIRTH _____

OCCUPATION _____ NUMBER OF DAYS IN US IN 2020 _____

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 2020 IN USA _____

ESTIMATED TAXES PAID FOR 2020 (OTHER THAN THOSE SHOWN ON W-2 OR 1042-S) 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 # _____

DURING 2020, DID YOU ENGAGE IN ANY VIRTUAL CURRENCY TRANSACTION? YES _____ NO _____

IF A RESIDENT FOR TAX PURPOSES: DURING 2020, 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.

LIST ECONOMIC IMPACT PAYMENTS RECEIVED (AMOUNT AND DATE) FOR EACH HOUSEHOLD MEMBER.

_____ DID YOU RETURN ANY OF THESE (DESCRIBE)?

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 2019 FEDERAL AND STATE TAX RETURNS IF YOU FILED. SEE "HOW TO ORDER" PAGE @ WWW.ENGLERCPA.COM.

**** THRU THIS WEBSITE SERVICE, WE DO NOT HAVE PRESET PRICING TO PREPARE TAX RETURNS WITH THE FOLLOWING TYPES OF INCOME OR DEDUCTIONS BECAUSE MOST FOREIGN NATIONALS DO NOT HAVE THESE: FOREIGN FELLOWSHIPS, SELF-EMPLOYMENT INCOME & 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 & DEPENDENT CARE EXPENSES, HEALTH INSURANCE PREMIUM TAX CREDIT, OR FOREIGN ASSET REPORTING IF VALUE OF ASSETS EXCEEDS \$10,000. 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