

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 2023 _____

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 2023 IN USA _____

ESTIMATED TAXES PAID FOR 2023 (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 2023, DID YOU ENGAGE IN ANY VIRTUAL CURRENCY TRANSACTION? YES _____ NO _____

IF A RESIDENT FOR TAX PURPOSES: DURING 2023, 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 _____.

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