

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 2024 \_\_\_\_\_

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 2024 IN USA \_\_\_\_\_

ESTIMATED TAXES PAID FOR 2024 (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 2024, DID YOU ENGAGE IN ANY VIRTUAL CURRENCY TRANSACTION? YES \_\_\_\_\_ NO \_\_\_\_\_

IF A RESIDENT FOR TAX PURPOSES: DURING 2024, 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