

Harrington Tax & Accounting INCORPORATED

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Client Organizer & Checklist

Anything change from last year:

- New address or phone (please write in those changes below)
- New dependent or spouse (please write in those changes below)
- First time client (please write in all pertinent information)

Personal Info (exactly as on Social Security card)

Taxpayer Name: _____

Date of Birth: M _____ D _____ Y _____ Social Security # _____

Spouse Name: _____

Date of Birth: M _____ D _____ Y _____ Social Security # _____

Marital Status:

- Single Married Divorced Separated, since date ____/____/____

Phone to reach you: Home _____ Work _____ Mobile _____

Current mailing address: _____

Email Address: _____

New Dependent (info exactly as on Social Security card)

Remove Dependent
↓ ↓

Full Name _____ Birthdate _____ SS# _____
Relationship _____ Months Lived with You _____ Student _____

Full Name _____ Birthdate _____ SS# _____
Relationship _____ Months Lived with You _____ Student _____

Full Name _____ Birthdate _____ SS# _____
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Full Name _____ Birthdate _____ SS# _____
Relationship _____ Months Lived with You _____ Student _____

How do you want your refund:

(Tax preparation fees can be deducted from options 1 & 2 only, or paid by check, cash or Visa/Master card.)

- Refund Anticipation Loan (Up to \$150 additional, 2 days)
- Refund Transfer (\$64 additional, 2 weeks)
- Direct Deposit (No additional charge, 2 weeks) Routing #: _____ Account #: _____ C S
- Mail my refund (No additional charge, 4-6 weeks)
- Same as last year

see second page for document checklist

Please include any documentation or information related to the following items.

Personal

- Last years tax return (new clients only)

Income

- W-2 income statements
- W-2G gambling income statements
- 1099 income statements
 - 1099-Int Interest income
 - 1099-Div Dividend income
 - 1099-B Income or Loss from Stocks, Bonds or Capital Assets
 - 1099-Misc Contract labor, rental income, reimbursements
 - 1099-G Government payments, unemployment
- Cash income totals from Farms, Ranches or Business that was not reported on any other form
- Rental income
- Tip income not reported on form W2
- Alimony received with SSN of payer
- Social Security statements
 - SSA-1099
- Retirement distribution statements
 - 1099-R

Expenses

- 1098T student loan interest paid statement
- Teacher expenses
- Education expenses (tuition, fees & books)
- Alimony paid with SSN of receiver
- Child & Dependent Care Credit information (Name, address, SSN or EIN Amount Paid)
- Estimated Tax Payments

To Itemize we need the following items

- Medical Expenses
 - Prescriptions
 - Doctors, Dentists, Hospitals & Lab Fees
 - Eye Glasses
- Taxes paid
 - Property tax
 - Vehicle registration
- 1098 mortgage interest statement
- Charitable contributions
 - Cash
 - Property
- On the job expenses (not reimbursed)
 - Union dues
 - Uniforms & protective clothing
 - Mileage on car (total miles and bus. miles)
 - Lodging & meals
- Gambling losses
- Investment expenses
- Last years tax prep fees

Please make notes or comments below
