

Nate Blotter & Associates, LLC

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Tax Organizer

	First	M	Last	Occupation	Birth Date	SS Number	Tuition/Books
Taxpayer							
Spouse							
Address							
Cell Phone	()		Home Phone	()		Email	

Dependent Information

Name	SS Number	Birth Date	Relationship	College	Tuition	Books

Child Care Expenses

Provider's Name	Address	SS# or EIN #	Amount Paid

Please provide: W-2's, all 1095's, all 1099's Rec'd, 1098 Mortgage Int. Paid, Voided check (for direct deposit information)

****New Clients: Provide copy of last year's tax return**

Estimated Tax Payments		IRA Contributions		Health Savings Acct (HAS)	
Federal		Amount		Amount	
Date	Amount			Contributions	Withdrawals
		Trad IRA- Taxpayer			
		Trad IRA- Spouse			
		Roth IRA- Taxpayer			
		Roth IRA- Spouse			

Income				Other Items		
Do you have any of the following income?				Have any of the following occurred this year?		
	Yes	No	Amount		Yes	No
Alimony				Blind- Taxpayer		
Commissions 1099's			Include Tax Form	Blind- Spouse		
Debt Forgiveness			Include Tax Form	Early Dist. From IRA/ Pension Acct		
Disability				Marital Status Change		
Dividends			Include Tax Form	Military Move Only		
Gambling				Date		
Installment Sales			Include Tax Form	Mileage		
Interest- Bank, etc.			Include Tax Form	Lodging Expenses		
IRA Distributions			Include Tax Form	New Family Members/ Dependents		
Land Sales				New Mailing Address		
Partnership/ S-Corp/Trust/Estate (K-1)			Include Tax Form	Refinanced Home - Need Closing Stmt		
Prizes and Awards				Bought or Sold Home- Need Closing Stmt		
Retirement 1099R			Include Tax Form	Purchased new car, light truck, motor home, motorcycle		
Royalties			Include Tax Form	Started a New Business		
Social Security			Include SS Stmt	Alimony Paid		
Stock Sales (Price & Cost)			Include Tax Form	Name		
Unemployment			Include Tax Form	SS #		
Wage W-2's			Include Tax Form	Amount		

