TAX TYME
INCOME TAX PREPARATION & PLANNING

New Client Organizer

Individual Income Tax Intake · Tax Year _____

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Welcome to Tax Tyme! Please complete both pages and bring the document for every item you check. Type in the shaded boxes. Skip anything that doesn't apply.

1 ABOUT YOU

Marital status on Dec 31: ☐ Single ☐ Married ☐ Divorced / separated ☐ Widowed Date it changed: _____

How did you hear about us? _____ **Referred by:** _____

YOU (TAXPAYER)

Full legal name (first, middle initial, last)

Social Security # | Date of birth

Occupation | Cell phone

Email

Driver's license / State ID # | State | Issued | Expires

IRS Identity Protection PIN (if you have one)

OK to text you? Yes | No **Blind or disabled?** Yes | No

SPOUSE (if married)

Full legal name (first, middle initial, last)

Social Security # | Date of birth

Occupation | Cell phone

Email

Driver's license / State ID # | State | Issued | Expires

IRS Identity Protection PIN (if you have one)

OK to text you? Yes | No **Blind or disabled?** Yes | No

2 ADDRESS & WHERE YOU LIVED AND WORKED

Ohio cities and school districts have their own income taxes

Home address | Apt # | City | State | ZIP

School district you live in (on your property tax bill or ohio.gov lookup) | County

Lived at this address all year? ☐ Yes ☐ No If no, previous address & move date: _____

Every city/village you LIVED in this year: _____

Every city/village you WORKED in this year: _____

Can someone else claim you (or your spouse) as a dependent? ☐ Yes ☐ No

3 DEPENDENTS (children or others you support)

FULL NAME	SOCIAL SECURITY #	DATE OF BIRTH	RELATIONSHIP	MONTHS WITH YOU	STUDENT	DISABLED
					☐	☐
					☐	☐

Paid for child or dependent care? ☐ No ☐ Yes *Bring each provider's name, address, tax ID, and the amount you paid.*

Any child born 2025 – 2028? No | Yes *They may qualify for a new "Trump account" with a $1,000 government deposit. Ask us.*

4 INCOME — check everything you received and bring the form(s)

☐ Wages – W-2 (how many?) _____
☐ Tips
Overtime pay
☐ Unemployment – 1099-G
☐ Social Security – SSA-1099
Pension, IRA, 401(k) – 1099-R

☐ Interest – 1099-INT
☐ Dividends – 1099-DIV
Stocks/investments sold – 1099-B
☐ Crypto / digital assets
☐ Sold a home or real estate
Gambling winnings – W-2G

☐ Self-employed / gig work *
☐ Rental property *
1099-K from payment apps
☐ Cancelled debt – 1099-C
☐ Workers' comp $ _____
Other income $ _____

** Please also complete our Self-Employed (Schedule C) or Rental Property organizer.*

Client name: _____

5 EXPENSES, DEDUCTIONS & CREDITS — check all that apply

- ☐ Mortgage interest – 1098
- ☐ Property taxes paid
- ☐ Rent paid $ _____
- ☐ College tuition – 1098-T
- ☐ Student loan interest – 1098-E
- ☐ Medical & dental expenses
- ☐ Marketplace health ins. – 1095-A
- ☐ HSA – 1099-SA / 5498-SA
- ☐ IRA / retirement contributions
- ☐ Cash donations $ _____
- ☐ Donated items $ _____
- ☐ Teacher classroom expenses
- ☐ Loan interest on a new car (2025+)
- ☐ Online / out-of-state purchases
- ☐ Childcare (see Section 3)

New car loan interest: bring the loan statement and the vehicle's VIN. Online purchases with no Ohio sales tax may owe Ohio use tax.

Estimated tax payments you made for this year:

Federal $ _____ Ohio $ _____ City $ _____ School district $ _____

6 OTHER QUESTIONS

Big changes this year (check all):

- ☐ Got married
- ☐ Had or adopted a baby
- ☐ Bought a home
- ☐ New job
- ☐ Retired
- ☐ Divorced / separated
- ☐ Moved
- ☐ Sold a home
- ☐ Lost a job
- ☐ Started a business

Does either of you owe back child support, student loans, or taxes? ☐ No ☐ Yes Who: _____

Did you get any letters from the IRS, Ohio, or your city? ☐ No ☐ Yes (bring them)

Did you file a tax return last year? ☐ Yes (bring a copy) ☐ No If no, last year filed: _____

Anything else we should know, or questions for us?

7 YOUR REFUND & OUR FEE

Get your refund by: ☐ Direct deposit (fastest) ☐ Check by mail ☐ Check printed in our office

Pay our fee by: ☐ Cash / check ☐ Credit / debit card ☐ Take it out of my refund (extra fees apply)

If you owe tax: ☐ Take it from my bank account ☐ I'll pay it myself

Bank name (for direct deposit or payment) _____ Routing # (9 digits) _____ Account # _____ ☐ Checking ☐ Savings

8 SIGNATURE

I confirm the information on this form is true and complete to the best of my knowledge. I will give Tax Tyme all the documents needed to prepare my return, and I understand that I am responsible for the accuracy of my tax return.

Your signature _____ Date _____ Spouse's signature _____ Date _____

OFFICE USE ONLY

Date received _____ Preparer _____ Client # _____ Fee quoted _____