

RLS Professional Services - Client Organizer Instructions

11835 Canon Blvd, Suite B101, Newport News, VA 23606

Phone: 757-240-4301 | Fax: 757-540-1087 | rlsproservices.com | rlsproserv@gmail.com

- Complete all sections of the Client Organizer as fully as possible. Please type directly into the fillable PDF.
- Provide a copy of your and your spouse's current government-issued photo ID (driver's license or equivalent).
- Enter your IRS Identity Protection PIN (if applicable) for taxpayer, spouse, and dependents.
- Attach all necessary documents: W-2s, 1099s, 1098s, K-1s, prior year's return (new clients), and receipts for deductions.
- Review the PATH Act notice regarding refund delays for EITC and ACTC credits.
- Sign and date the organizer where indicated (Taxpayer Signature and Spouse Signature).
- Return the completed organizer and documents to us using one of the following methods:

Email: rlsproserv@gmail.com

Fax: 757-540-1087

Mail/Drop-off: 11835 Canon Blvd, Suite B101, Newport News, VA 23606

Website Upload: rlsproservices.com

Personal Information

Taxpayer Name:

Taxpayer SSN:

DOB:

Occupation:

Email:

Phone:

Taxpayer IRS IP PIN:

Spouse Name:

Spouse SSN:

DOB:

Occupation:

Spouse Email:

Phone:

Spouse IRS IP PIN:

Street Address:

City:

State:

ZIP:

Filing Status

Single

Married Filing Jointly

Married Filing Separately

Head of Household

Widow(er)

Dependents (up to 6)

Name	Relationship	DOB	SSN	Months	Student	Disabled	IRS IP PIN
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Required Documents

Last year's tax return (new clients only)

W-2s, 1099s, 1098s, K-1s

Driver's license or government ID

Medical / Dental Expenses

Charitable Contributions

Property Tax Statements

Bank Statements (if self-employed)

Refund Direct Deposit Information

Owner of Account:

Type (Checking/Savings):

Bank Name:

Routing Number:

Account Number:

Important Refund Information (PATH Act)

Beginning in 2017, the PATH Act requires the IRS to hold refunds on tax returns claiming the Earned Income Tax Credit (EITC) or Additional Child Tax Credit (ACTC) until mid-February. This delay applies to the entire refund, even the portion not related to EITC/ACTC, to help detect and prevent fraud.

Certification

By signing below, I confirm that the information provided is complete and accurate.

Taxpayer Signature:

Date:

Spouse Signature:

Date: