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RLS PROFESSIONAL SERVICES, LLC

Please complete this Organizer before your appointment.

1. Personal Information

Name		Soc. Sec. No.	Date of Birth	Occupation	Home Phone
Taxpayer					
Spouse					
StreetAddress		City	State	ZIP	Cell Phone
Email Address					
Do you have a Identity Protection PIN for the IRS					

	<u>Taxpayer</u>		<u>Spouse</u>		<u>Marital Status</u>		
Blind	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Married	Will file jointly <input type="checkbox"/> Yes <input type="checkbox"/> No	
Disabled	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Single		
Pres. Campaign Fund	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Widower	-Date of Spouse's Death _____	

2. Dependents (Children & Others)

Name (First, Last)	Relationship	D.O.B	Social Security #	Months Lived with You	Disabled	Full Time Student	Dependent's Gross Income	ID Prot. PIN

Please attach the following:

- Last year's tax return (new clients only)
- Name and address label (from government booklet or card)
- All statements (W-2s, 1098s, 1099s, etc.)
- Picture of Current driver's licenses or government ID
- Medical/Dental Expenses
- Charitable Contributions
- Taxes Paid (Real and/or Personal Property Tax)

3. Direct Deposit of Refund / or Savings Bond Purchases

Would you like to have your refund(s) directly deposited into your account?

Yes, No

(The IRS will allow you to deposit your federal tax refund into up to two different accounts. If so, please provide the following information.)

ACCOUNT 1

Owner of account

Taxpayer Spouse Joint

Type of account MyRA Checking Traditional Savings Traditional IRA Roth
 IRA Archer MSA Savings Coverdell Education Savings HSA Savings SEPIRA

Name of financial institution _____

Financial Institution Routing Transit Number _____

Re-enter Routing Transit Number _____

Your Bank Account Number _____

Re-enter Bank Account number: _____

As of 2017 Some Refunds Delayed:

"Beginning in 2017, a new law approved by Congress requires the IRS to hold refunds on tax returns claiming the EITC or the ACTC until mid-February. The IRS must hold the entire refund — even the portion not associated with the EITC and ACTC — until at least Feb. 15. This change helps ensure that taxpayers get the refund they are owed by giving the agency more time to help detect and prevent fraud."

"This is an important change as some of these taxpayers are used to getting an early refund," said IRS Commissioner John Koskinen. "We want people to be aware of the change for their planning purposes during the holidays. We don't want anyone caught by surprise if they get their refund a few weeks later than in previous years."

To the best of my knowledge the information enclosed in this client tax organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

 Taxpayer Date Spouse Date
 (Please include spouse if filing jointly)