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2021	1040	US	Client Information	1

Office Of Geri & Stephanie 5464 Baltimore Dr. Suite B

La Mesa, CA 91942

Telephone number: (619) 697-2950 Fax number: (619) 697-0578

E-mail address:

Tax Return Appointment

Date: Time: Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2021 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

Filing status (table)								
1=married filing separate and lived with spouse								
Year spouse died, if qualifying widow(er) (2019 or 2020)								
First name and initial								
Last name								
Title/suffix								
Social security number								
Occupation								
Date of birth (m/d/y)								
Date of death (m/d/y)								
1=blind								
First name and initial								
Last name								
Title/suffix								
Social security number								
Occupation								
Date of birth (m/d/y)								
Date of death (m/d/y)								
1=blind								
In care of								
Street address								
Apartment number								
City								
State								
ZIP code								
Region								
Postal code								
Country								

Filing Status

- 1 = Single 2 = Married filing joint 3 = Married filing separate 4 = Head of household 5 = Qualifying widow(er)

Please add, change or delete information for 2021. CLIENT INFORMATION Home phone. Work phone. Work extension. Daytime phone (table). Mobile phone. Fax number. E-mail address. Home phone. Work extension. Daytime phone. Work phone. Work phone. Work phone. Fax number. E-mail address. Home phone. Work extension. Daytime phone (table). Mobile phone. Fax number. E-mail address. Taxpayer Authentication Taxpayer Spouse Authentication Spouse Oriver's license no. Driver's license state. Issue date (m/d/y). Expiration date (m/d/y). Driver's license state. Issue date (m/d/y). Spouse Authentication	Please add, change or delete information for 2021. CLIENT INFORMATION Home phone	I	1040	US	Client Information (continued)	1	
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