PERSONAL INFORMATION ORGANIZER

Please complete this Organizer before your appointment.

1. PERSONAL INFOR	MATION														
Name -			OON STINE DO			of Birth Date of Death			Ossumation				Blind Disabled		
Name Taxpayer			SSN or ITIN D			of Birth Date of Dea			Occupation			В	lind	Disa	blea
Spouse													пt	\vdash	
Street Address			Apt. City or town			State			Zip Code			Co	ounty		
Foreign country	Foreign province/state					Fore			reign postal code						
E-mail Address(es)			ŀ			Home Phone			Mobile Phone						
2. FILING STATUS															
Single															
3. DEPENDENTS															
A. REFUND INFORMA 1. Would you like to have a Bank Account Ownership Type Bank name Routing number Account number Account outside the juris	any refunds direc	tly deposition of the second s	e 🗌 Jo		pank acc	With Count? Bank A Owner: Type Bank n Routing Accourt	Accountship ame g numbht numbh	er eer	Stu	dent	er S	[Yes	Join	Paid
5. IDENTIFICATION INFORMATION															
	NOKINATION														
Taxpayer Type of ID: Driver's license State-issued ID No ID ID number Location of issuance Issue date Expiration date						Spouse Type of ID: Driver's license State-issued II No ID ID number Location of issuance Issue date Expiration date							ID		
6. HEALTH CARE INF	ORMATION														
Please indicate where you	received your he	ealth in	surance f	rom for	all mer	nbers	of your	tax hous	ehold						

Private Exchange (Individual Insurance Company)

Government-Sponsored Marketplace

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7. MISCELLANEOUS PERSONAL INFORMATION QUESTIONS	
1. Check the applicable boxes if you wish to contribute \$3 to the Presidential Election campaign fund. 2. Were you a victim of identity theft and have you been contacted by the IRS?	er Spouse No
3. Were you (or your spouse if filing jointly) a nonresident alien for any part of 2020? Yes 4. Have you received any notices or correspondences from the IRS or state in the past 3 tax years? Yes	☐ No ☐ No
5. Do you have any children age 18 or under (or student under age 24) who had unearned income of more than \$2,200? Yes	☐ No
6. If any of your children are required to file a return, do you elect to report your child's interest and dividends on your return?	☐ No
7. Did you give a gift of more than \$15,000 to one or more people?	☐ No ☐ No
8. COMMENTS	
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