

RLS PROFESSIONAL SERVICES, LLC

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Please complete this Organizer before your appointment. Prior year clients should use the proforma Organizer provided.

1. Personal Information

Name		Soc. Sec. No.	Date of Birth	Occupation	Contact Phone
*Taxpayer					
Spouse					
Street Address/Mailing Address*		City	State	ZIP	Best time to contact
Email Address					
Do you have an Identity Protected PIN for the IRS					
Do you or your Spouse owe back taxes for any year? If so what year(s)					
Are you or your spouse: Blind or Disabled					
Filing Status: (Circle One) Single Married Filing Joint Married Filing Separately Head of Household Divorced (Date of Divorce) Widower (Date of Death)					

2. Dependents (Children & Others)

Name (First, Last)	Relationship	DOB	Social Security #	Months Lived with You	Disabled	Full Time Student	IRS PIN

Please attach the following information:

Personal Information:

- Current driver's license or government-issued ID (picture required for verification).
- Social Security cards or ITINs for you, your spouse, and dependents.
- A copy of last year's tax return (if not already on file with us).

Banking Information (for direct deposit/refund) Account #1

- **Bank Name:** _____
- **Routing Number:** _____
- **Re-enter Routing Number:** _____
- **Account Number:** _____
- **Re-enter Routing Number:** _____
- **Account Type (Checking/Savings):** _____

Banking Information (for direct deposit/refund) Account #2

- **Bank Name:** _____
- **Routing Number:** _____
- **Re-enter Routing Number:** _____
- **Account Number:** _____
- **Re-enter Routing Number:** _____
- **Account Type (Checking/Savings):** _____

Notice:

Some Refunds Delayed Beginning in 2021*****

- "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."

Client Acknowledgment

By signing below, I confirm that the information provided is accurate to the best of my knowledge and authorize RLS Professional Services to prepare my tax return based on the provided data.

Signature: _____ **Date:** _____

Spouse's Signature: _____ **Date:** _____

RLS Tax Document Checklist

To ensure a smooth and efficient tax preparation process, please gather and provide the following documents:

Income Documents:

- W-2 forms from all employers.
- 1099 forms (e.g., 1099-NEC for self-employment income, 1099-DIV for dividends, 1099-INT for interest income, 1099-R for retirement income).
- Unemployment income statements (Form 1099-G).
- Social Security benefits statement (SSA-1099).
- Alimony received (if applicable).
- Any other income documentation (e.g., rental income, scholarships).

Deductions and Credits:

- Mortgage interest statement (Form 1098).
- Property tax records.
- Medical and dental expense records.
- Childcare expenses, including provider's name, address, and tax ID.
- Education expenses (Form 1098-T, tuition, and fees).
- Records of charitable donations (cash and non-cash).
- Business expenses (receipts and records for self-employed individuals).

Other Relevant Documents:

- Form 1095-A, 1095-B, or 1095-C (proof of health insurance coverage).
- Any notices or letters from the IRS.
- Bank account and routing numbers for direct deposit/refund.

Additional Documents for Specific Situations:

- Rental property income and expenses.
- Investment income (stock transactions, capital gains/losses).
- Retirement contributions (e.g., IRA contributions).
- Records of estimated tax payments made.

Please ensure all documents are accurate and legible. If you have any questions or need assistance gathering these materials, don't hesitate to contact us at **757-240-4301** or via email at **contact@rlsproservices.com**.

Thank you for choosing RLS Professional Services!

