TOM UMSTATTD CPA
Endeavoring Conscientiously Toward Superior Service
Certified Public Accountant
13276 Research Blvd., Suite 101
Austin, Texas 78750
(512) 250-1090 (512) 250-1972
TaxManTom.com

New Client Tax Information and Organizer for Tax Year 20__

Taxpayer:

Name: ____________________________

Street/PO box: ____________________________

City: ____________________________

State: ____________________________

ZIP: ____________________________

Phone: ____________________________

Email: ____________________________

Soc Sec #: ____________________________

Date of birth: ____________________________

Occupation: ____________________________

Spouse:

Name: ____________________________

Street/PO box: ____________________________

City: ____________________________

State: ____________________________

ZIP: ____________________________

Phone: ____________________________

Email: ____________________________

Soc Sec #: ____________________________

Date of birth: ____________________________

Occupation: ____________________________

Dependents:

Name	Relationship	Date of Birth	Soc Sec #

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(Please indicate whether you had any of the following and provide any tax documents you received for the current tax year, such as W-2s, 1099s, K-1s, 1098 mortgage statements, 1098-T tuition statements, etc.)

Income

- Wages ☐
- Interest income ☐
- Dividend income ☐
- Distributions from employer retirement plan(s) ☐
- Distributions from IRA(s) ☐
- Social Security income ☐
- Gains or losses from sales of stocks or other financial securities ☐
- Business income (as a sole proprietor or independent contractor) ☐
- Rental income or loss ☐
- Income from partnership(s) ☐
- Income from S-Corporations ☐
- Income from trusts ☐
- Unemployment income ☐
- Farm income or loss ☐

Other income not specified above (please describe)

Type/source of other income:	Amount:
______________________________________	_______________
______________________________________	_______________
______________________________________	_______________

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Personal deductions:

Real estate taxes you paid ☐

Mortgage interest you paid on your primary or secondary residence ☐

Charitable contributions ☐

Expenses for college, vocational schools, or other higher education ☐

IRA contributions ☐

Health savings account (HAS) contributions ☐

Miscellaneous questions:

	Yes	No
Did you received the third stimulus check (i.e. the Biden stimulus check under the American Rescue Plan)?	☐	☐
Did you own any cryptocurrencies, or otherwise have any dealings with cryptocurrencies in this tax year?	☐	☐
Did you have any income from foreign sources in this tax year?	☐	☐
Did you have any foreign bank accounts or own other foreign assets in this tax year?	☐	☐
Did you buy or sell a house in this tax year?	☐	☐

Self-employed taxpayers:

(Not applicable if your business files taxes as a Corporation, S-Corporation, or Partnership)

Name of business: ____

Business address: ____

Employer Identification Number (EIN): ________________________________

Entity type (for example: Sole Proprietor, LLC, Corporation): _______________

	Yes	No
Does your spouse operate the business with you?	☐	☐
Do you have employees?	☐	☐
Do you have independent contractors?	☐	☐

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Please provide our office with the following:

- Report of income and expenses (for example, Profit and Loss report)
- Balance sheet
- Beginning and ending balances of all business bank accounts

Information on your vehicle used for business:

Make and model ________________________________

Purchase price of vehicle ________________________________

Year vehicle placed in service ________________________________

Beginning of year odometer reading ________________________________

End of year odometer reading ________________________________

Total miles driven for the year ________________________________

Business miles driven for the year ________________________________

Personal miles driven for the year ________________________________

	Yes	No
Do you have another vehicle for personal use?	☐	☐

Privacy Policy:

CPAs are bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

Types of Non-Public Personal Information We Collect
We collect non-public personal information about you that is provided to us by you are obtained by us with your authorization.

Parties to Whom We Disclose Information
For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties

who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of the information being shared.

Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your non-public personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.