



**SANZ VIRTUAL ENTERPRISE, LLC**  
**ACCOUNTING AND TAXES**  
**CPA SERVICES**

## Client Tax Organizer Worksheet

**Taxpayer Names:**

	First and Last Names	Date of Birth	Email	Phone number
Taxpayer				
Spouse				

Address: \_\_\_\_\_

**Select applicable Filing Status:**

Single
  Married Filing Jointly
  Head of Household
  Qualifying Widow(er)
  Married Filing Separately

Number of Dependents to be claimed on tax return \_\_\_\_\_

**Dependents info:**

Name	Date of Birth	Relationship

**Income & Earnings info:**

W-2s	Earnings Amount	Taxes Withheld	1099s	Earnings Amount	Taxes Withheld
W-2 #1			1099 #1		
W-2 #2			1099 #2		
W-2 #3			1099 #3		

**Deductions & Credits:**

Expense	Amount	Expense	Amount
Mortgage interest		Cash donations	
Property taxes		Non-cash donations	
Ad-valorem taxes		Medical expenses	
State taxes paid		Child care expenses	
Educational expenses		Dependent care exp	

Medical miles driven: \_\_\_\_\_

Charitable activity miles driven: \_\_\_\_\_

How did you hear about us? \_\_\_\_\_