

2023 Individual Taxpayer Organizer

GIACOBAZZI'S INCOME TAX, INC
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Taxpayer				Tax ID # *	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email	IP PIN	
Occupation		Date of birth		Are you new to our firm? Yes No	
Address		City		State	Zip
County		Primary phone		Secondary phone	
Driver's License	No.	State	Issue Date	Exp. Date	

Spouse				Tax ID # *	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email	IP PIN	
Occupation		Date of birth		Are you new to our firm? Yes No	
Address <small>(if different from Taxpayer)</small>		City		State	Zip
County		Primary phone		Secondary phone	
Driver's License	No.	State	Issue Date	Exp. Date	

If you moved during 2023, enter your previous address.	Date of move
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Marital status on 12/31/23: Single Married Separated Surviving Spouse Registered Domestic Partnership (RDP)
 Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No
Note: Individuals in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.
Notices: Have you received any notice from the IRS or state revenue department within the past year? Yes No

Names of dependent children <i>Child's full name</i>	Tax ID # *	IP PIN	Date of birth	Months lived in home in 2023	Relationship to taxpayer	College student?

Did any of the children have unearned income above \$1,250 for the year? Yes No Do any of the children have a disability? Yes No
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2023? Yes No

Other dependents or people who lived with you						
Name	Tax ID # *	IP PIN	Date of birth	Months lived in home in 2023	Relationship	Income

Bank information: Use for <input type="checkbox"/> Direct deposit of refund <input type="checkbox"/> Direct debit of balance due <i>Name of bank</i>						
Checking	Savings	Routing transit number	Account number			

Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.
 *A Tax ID # is either a Social Security Number (SSN), adoption taxpayer identification number (ATIN), or an individual taxpayer identification number (ITIN).