



Books by Kelly, LLC
 2018 Tax Organizer
 Basic Taxpayer Information

Personal Information

	Taxpayer	Spouse
Last Name:	_____	_____
First Name:	_____	_____
Middle Initial and Suffix:	MI _____ Suffix _____	MI _____ Suffix _____
Nick Name:	_____	_____
Social Security Number:	_____	_____
Occupation	_____	_____
Work Phone:	_____ Extension _____	_____ Extension _____
Cell Phone:	_____	_____
E-mail Address:	_____	_____
Birthdate (mm/dd/yyyy):	_____	_____
Blind:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Presidential Election Campaign Fund:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Eligible to be claimed as a dependent on another return:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Street Address: _____ Apt Number: _____
 City: _____ State _____ Zip Code _____
 Home Phone: _____ Foreign Country _____
 Fax: _____ Foreign Phone _____

Filing Status

- 1** Single
- 2** Married Filing Jointly
- 3** Married Filing Separately
 - Check this box if you did not live with spouse at any time during the year
 - Check this box if you are eligible to claim spouse's exemption
 - Check this box if your spouse itemizes deductions
- 4** Head of Household
 - If the qualifying person is a child, but not a dependent,
 Child's Name: _____ Child's SSN: _____
- 5** Qualifying widow(er)
 - Check the box for the year the spouse died 2016 2017

Same-sex married couples are required to file as Married Filing Jointly or Married Filing Separately for federal returns, regardless of where the married couple lives. Same-sex married couples may also want to file amended returns for prior years.