

NEW CLIENT INCOME TAX ORGANIZER

**ARMSTRONG, DITZ & ASSOCIATES CPAs
1236 CLAREMONT AVE.
ASHLAND, OHIO 44805
(419) 281-1040**

PERSONAL DATA	TAXPAYER(HUSBAND) (T)	SPOUSE (WIFE) (S)
NAME:		
ADDRESS: **		
CITY,STATE,ZIP		
COUNTY, SCHOOL DIST.		
OCCUPATION		
BIRTHDATE(mm\dd\yy)		
SOCIAL SECURITY		
HOME PHONE *		
WORK PHONE *		
CELL PHONE *		
EMAIL *		

* circle best contact and indicate best time for contact ** New Address? Date of change _____

DEPENDENTS: DON'T INCLUDE SELF OR SPOUSE * if not living with you, enclose divorce agreement or Form 8332

NAME	BIRTHDAY (mm\dd\yy)	SOCIAL SECURITY	RELATION- SHIP	# MOS IN HOME (x if none)*	FULL - P/T COLLEGE

**DOES ARMSTRONG, DITZ HAVE A COPY OF YOUR PRIOR YEAR TAX RETURN?
IF NOT PLEASE PROVIDE TO US.**