



NOTE: This organizer is intended for those dropping off or mailing in their tax forms. For quicker service, use our new Smart Organizer at <https://profilerconsulting.com/virtual-prep/>

Taxpayer information

Spouse information

Full name		Full name	
Social Security #		Social Security #	
Date of Birth		Date of Birth	
Occupation		Occupation	
Phone #		Phone #	
Email (required)		Email (required)	
Is the Taxpayer... (check all that apply)	<input type="checkbox"/> Blind <input type="checkbox"/> Deceased (date _____) <input type="checkbox"/> Claimed by someone else	Is the Spouse... (check all that apply)	<input type="checkbox"/> Blind <input type="checkbox"/> Deceased (date _____) <input type="checkbox"/> Claimed by someone else

What is your preferred method of communication?
Check all that apply.

- Taxpayer email Spouse email
 Taxpayer phone Spouse phone

Full address (where you will receive mail this year)

What is your filing status?

- Single Married Filing Separate Head of Household Widow(er) Not sure

Dependents Check here if you are unsure you can claim a listed dependent and then add notes on page 3.

Full name	Social Security #	Relation	Date of Birth	Grade	K-12 costs (if MN resident)

Itemized Deductions

If you contributed to charity, please list the total dollar amount.	_____
How much did you pay for license tabs on vehicles?	_____
If you own a home, enter your property taxes. <i>(include up to two locations)</i>	_____
Personal medical expenses? <i>(do not include insurance premiums)</i>	_____
Did you have educator expenses <i>(teacher)</i> of up to \$250? If so, enter the amount.	_____

Refund or Payment choices - You **must** attach a voided check for direct deposit or bank withdrawal.

If you receive a refund, how would you prefer to receive it? Direct deposit is fastest (avg is 1-3 weeks vs 4-8 weeks).	<input type="radio"/> Mailed check <input type="radio"/> Direct deposit
If you owe taxes, how would you like to pay?	<input type="radio"/> Mail check <input type="radio"/> Bank withdrawal
For <i>direct deposit</i> or <i>bank withdrawal</i> : 1) Enter your bank account number (select one: <input type="radio"/> <i>Checking</i> or <input type="radio"/> <i>Savings</i>). 2) Enter your routing number.	1) _____ 2) _____

Miscellaneous

If you moved during the past tax year, please list the date you moved.	_____
Do you have rental income? If so, please use our "Rental Property Organizer" found on our website.	<input type="radio"/> Yes <input type="radio"/> No
Did you make any estimated tax payments? If yes, provide dates and amounts for both Federal and State.	<input type="radio"/> Yes <input type="radio"/> No
Did you contribute to an IRA or HSA (health savings account) outside of your W-2?	<input type="radio"/> Yes <input type="radio"/> No
Did anyone in your family attend college? If yes, include 1098-T form (you might have to get a copy from your child).	<input type="radio"/> Yes <input type="radio"/> No
Any student loan interest that you paid? If yes, include a statement.	<input type="radio"/> Yes <input type="radio"/> No
Did you install any energy-efficient material in your house? (e.g. doors, insulation, windows)	<input type="radio"/> Yes <input type="radio"/> No
Did you operate a small business (Mary Kay, small machine repair, consulting, farm, etc)? If yes, please use our "Business Income/Expense Organizer" found on our website.	<input type="radio"/> Yes <input type="radio"/> No
Were any of your children in daycare or did you pay anyone to watch them? If yes, please attach paperwork for provider's name, address, and ID number (Fed ID or SSN).	<input type="radio"/> Yes <input type="radio"/> No
Did you live and work in more than one state? If so, explain.	<input type="radio"/> Yes <input type="radio"/> No

MN Taxpayers

Would you like us to file a **property tax refund** or **rent refund** for you? We charge a small fee and process them after April 15th. More information can be found here:

profilertax.com/mn-prop-tax/

- Yes
 No
 Not MN resident

Covid Relief

Did you receive any stimulus payments in 2020 and/or 2021? If yes, please list the dates and amounts:

Date 1: _____

Amount: _____

Date 2: _____

Amount: _____

Additional Notes

Frequently Asked Questions

Q. Can I submit my documents while I'm missing some forms?

A. Our paper and digital organizers are designed to help identify what information and documents to gather. Please do not submit your paperwork until all documents are attached, but we understand you may not have access to everything.

Thank you!

Q. How long will it take to finish my tax return?

A. We get to the client submissions on a first-come, first-served basis.

Q. Who is working on my tax returns?

A. Our seasoned professionals are a mix of Enrolled Agents (highest designation for tax professionals) and supervisors that help ensure the quality of each tax return.

Q. What happens after I submit my tax documents?

A. Once you submit your documents, our team starts the process of entering your data. We collaborate with our team to optimize your unique tax filing. Our professionals will email, call or text you regarding follow-up questions or concerns. Once we're close to finishing, we will ask if you'd like to finish over email, phone or zoom.