C P A

2023 Tax Organizer

New Clients please bring the last tax return

BRIAN L BRENNER CPA, 662-349-5999 fax 901-297-4125 7193 Swinnea Rd, Suite C, Southaven Ms 38671

Taxpayer Name	Help us to prepare an accurate retu	rn for you: Please REVIEV	V & COMPLETE this	<u>organizer.</u>			
Phone	PhoneP		e Name				
DRIVERS LICENSE OR STATE ID INFO: if new or renewed in the year TAXPAYER State ID#			Phone				
TAXPAYER StateID#							
Issue Date			•				
Complete this section ONLY if the info has CHANGED since last year/or if you are a NEW CLIENT Taxpayer SS# Spouse SS# Spouse SF# Taxpayer Birth Date Spouse Birth Date Tip Code DEPENDENT INFORMATION FOR RETURNING CLIENTS: JUST FILL OUT ANY CHANGES FIRST AND LAST NAME SS# BIRTH DATE RELATIONSHIP TO YOU DIRECT DEPOSIT OF REFUNDS ESTIMATED TAXES PAID FOR 2023 TAXES Would you like any refunds to direct deposit to your bank account? AMOUNT Yes No If yes, please provide your Bank info below. DUE DATE DATE PAID FEDERAL STATE Apr. 18, 2023 Apr. 18, 2023 Sept. 15, 2024 Sept. 16, 2023 Sept. 17, 2024 Sept. 17, 2024 Sept. 18, 2024 Sept. 18							
Complete this section ONLY if the info has CHANGED since last year/or if you are a NEW CLIENT Taxpayer S\$# Spouse \$\$\$\$\$\$ Spouse Birth Date							
Taxpayer SS#	Expiration Date	Expi	ration Date				
DEPENDENT INFORMATION FOR RETURNING CLIENTS: JUST FILL OUT ANY CHANGES FIRST AND LAST NAME SS# BIRTH DATE RELATIONSHIP TO YOU DIRECT DEPOSIT OF REFUNDS ESTIMATED TAXES PAID FOR 2023 TAXES Would you like any refunds to direct deposit to your bank account? AMOUNT Yes No If yes, please provide your Bank info below. DUE DATE DATE PAID FEDERAL STATE Apr. 18, 2023	Taxpayer SS#		Spouse SS# Spouse Birth Date				
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DIRECT DEPOSIT OF REFUNDS ESTIMATED TAXES PAID FOR 2023 TAXES Would you like any refunds to direct deposit to your bank account? AMOUNT Yes No If yes, please provide your Bank info below. DUE DATE DATE PAID FEDERAL STATE Apr. 18, 2023 Apr. 18, 2023 Sept. 15, 2023 Sept. 15, 2023 Jan. 15, 2024	FIRST AND LAST NAME	SS#	BIRTH DATE	E REI	RELATIONSHIP TO YOU		
Would you like any refunds to direct deposit to your bank account? Yes No If yes, please provide your Bank info below. DUE DATE DATE PAID FEDERAL STATE Apr. 18, 2023							
Yes No If yes, please provide your Bank info below. DUE DATE DATE PAID FEDERAL STATE Apr. 18, 2023							
Routing # Jan. 15, 2024	Yes No If yes, please provi	ide your Bank info below.	DUE DATE Apr. 18, 2023		FEDERAL	STATE	
Routing # Jan. 15, 2024			Sept. 15, 2023				
A 1.4	Routing #						
	A 1.44						

YES

N0

DO YOU WANT A PAPER COPY OF YOUR TAX RETURN?