

Dynamic Tax Service – Digital Tax Organizer (Client Fill-In)

Full Legal Name:

Date of Birth:

Social Security Number:

Phone Number:

Email Address:

Home Address:

Marital Status:

Dependents (Names & SSNs):

W-2 Income:

1099 Income:

Self-Employment Income:

Unemployment Income:

Retirement Income:

Bank Interest:

Cryptocurrency Income:

Child Tax Credit Eligibility:

Education Credits:

Medical Expenses:

Donations:

Business Expenses:

Bank Routing Number:

Bank Account Number: