



Get Organized for Tax Time with the Beehive!

Use this form to collect the information you'll use in your tax preparation. Keep it with a copy of your tax return and any other forms you used in a safe place for reference.

Taxpayer Information

Fill this in as it appears on your Social Security Card or Individual Taxpayer Identification Number letter.

Your First Name		M.I.	Last Name		SSN or ITIN	
Date of Birth	Job Title (Construction Worker, Clerk, Student, Nurse, etc)					
Spouse's First Name		M.I.	Last Name		SSN or ITIN	
Date of Birth	Job Title (Construction Worker, Clerk, Student, Nurse, etc)					
Address		Apt #	City		State	Zip Code
Daytime Phone		Evening Phone			Cell	

Family and Dependent Information

Print the name of children or other dependents living in your home that you supported during the year.

Full Name Do not include yourself or your spouse	Date of Birth	Relationship (son, daughter, mother, etc)	Social Security number or ITIN	How many months lived with you last year	Is the dependent a full-time student?

Other information that may be used in tax preparation

Can your parents or someone else claim you or your spouse as a dependent?	Yes	No	Are you a US Citizen? (used for calculating credits)	Yes	No
	Yes	No		Is your spouse a US Citizen?	Yes
On December 31st, Were you:	Single	Divorced	Are you Legally Blind?	Spouse	Taxpayer
	Legally Married	Separated	Permanently or Totally Disabled?	Spouse	Taxpayer

