

**2016 Personal Organizer**  
 Norwalk Business Service, Inc.  
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Your Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Spouse's Name \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Cell # \_\_\_\_\_ Home # \_\_\_\_\_ Email Address \_\_\_\_\_ @ \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ St \_\_\_\_\_ Zip \_\_\_\_\_  
 Your Driver's License: \_\_\_\_\_ Spouse's Driver's License: \_\_\_\_\_  
 Your License State Issued: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expiration Date: \_\_\_\_\_  
 Spouse's License State Issued: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

**Note:** The items and questions listed on this personal deduction sheet may or may not pertain to your tax situation. We are all different with special situations. Please use this sheet or a separate sheet to list all questions and items you feel are important to your tax return.

**\*\*\*\*New clients please bring a copy of your prior years tax return\*\*\*\***

Name	Birthdate	SSN (Mandatory)	Relationship	Months lived at home (if less than 12)
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____

**Estimated Taxes:**

Federal			State		
<u>Due Date</u>	<u>Date Paid</u>	<u>Amount</u>	<u>Due Date</u>	<u>Date Paid</u>	Amount
4/18/2016	_____	\$ _____	4/18/2016	_____	\$ _____
6/15/2016	_____	\$ _____	6/15/2016	_____	\$ _____
9/15/2016	_____	\$ _____	9/15/2016	No Due Date	\$ _____
1/16/2017	_____	\$ _____	1/16/2017	_____	\$ _____

Other Payments to IRS Date: \_\_\_\_\_ \$ \_\_\_\_\_ Date: \_\_\_\_\_ \$ \_\_\_\_\_  
 Other Payments to FTB Date: \_\_\_\_\_ \$ \_\_\_\_\_ Date: \_\_\_\_\_ \$ \_\_\_\_\_

**1. Interest Received: Bring Form 1099 INT**

Banks, Savings, Credit Unions		Tax Exempt Interest (Do not include IRA earnings)	
From	Amount	From	Amount
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

**Interest Received from Individuals:**

Name	Address	SSN(Mandatory)	Amount
_____	_____	_____	\$ _____

**2. Stocks Dividends Received: Bring Form 1099-DIV & 1099-B**

From	Amount	From	Amount
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

**3. Unemployment Income Received**

\$ \_\_\_\_\_

**Unemployment Income Repaid**

\$ \_\_\_\_\_