



Pillars Tax & Financial Services
 "Your One-Stop Financial Services Center"
 342 N. Allen Avenue
 Pasadena, CA 91106

Phone (626) 304-9811
 Cell (626) 429-5448
 Fax (626) 304-0811
 Web www.PillarsTax.com

INCOME TAX ORGANIZER

CONFIDENTIAL INFORMATION

Taxpayer Information

SSN	First Name & MI	Last Name	Birth Date
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Spouse Information

SSN	First Name & MI	Last Name	Birth Date
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NOTE TO OUR VALUED CLIENTS: Please fill-out or update your e-mail address & cell phone numbers!
 If there are NO changes to the below information, there is no need to fill out the remaining part of this page.

Filing Status (Please Check One)				
<input type="checkbox"/> 1-Single	<input type="checkbox"/> 2-Married Joint	<input type="checkbox"/> 3-Married Filing Separate	<input type="checkbox"/> 4-Head of Household	<input type="checkbox"/> 5-Widow/er
Street Address				
City		State	Zip Code	
Work Phone (with area code)			Home Phone (with area code)	
Email Address			Cell Phone	
Taxpayer	Occupation			Election Fund? <input type="checkbox"/> Yes <input type="checkbox"/> No
Spouse	Occupation			Election Fund? <input type="checkbox"/> Yes <input type="checkbox"/> No

DEPENDENT INFORMATION

First Name	Last Name	SSN	Date of Birth	Relationship

IRS REFUND – DIRECT DEPOSIT

(Please submit a voided check to our office for accuracy)

This-Year Bank Interest Income \$ _____ Last-Year State Tax Refund \$ _____

By signing below, I/We hereby certify that ALL information filled out on the four (4) pages of these forms are correct and true. I/We also solemnly declare that all of these information are supported by receipts and other documentation as prescribed by the Internal Revenue Service (IRS).

Check this box if you DO NOT want to receive other financial service offers from our affiliated companies

Signature _____ Date _____
 Signature _____ Date _____