

2007	1040	US	Client Information	1
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Balter Tax Service
 1147 16th St.
 Santa Monica, CA 90403
 Telephone number: (310) 399-0621
 Fax number: (310) 828-9162
 E-mail address:

Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2007 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

Filing Status	Filing status (table)		<p align="center">Filing Status</p> <p>1 = Single 2 = Married filing joint 3 = Married filing separate 4 = Head of household 5 = Qualifying widow(er)</p>
	1=married filing separate and lived with spouse.		
	Year spouse died, if qualifying widow(er) (2005 or 2006).....		
Taxpayer	First name and initial		
	Last name.....		
	Title/suffix		
	Social security number.....		
	Occupation		
	Date of birth (m/d/y)		
	Date of death (m/d/y)		
1=blind.....			
Spouse	First name and initial		
	Last name.....		
	Title/suffix		
	Social security number.....		
	Occupation		
	Date of birth (m/d/y)		
	Date of death (m/d/y)		
1=blind.....			
Address	In care of.....		
	Street address		
	Apartment number.....		
	City.....		
	State.....		
Foreign Address	ZIP code		
	Region.....		
	Postal code.....		
	Country.....		

Please add, change or delete information for 2007.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone.		<p>Daytime Phone</p> <p>1 = Work 2 = Home 3 = Mobile</p>
	Work phone.		
	Work extension.		
	Daytime phone (table)		
	Mobile phone.		
	Pager number.		
	Fax number.		
	E-mail address.		
Spouse Contact Information	Home phone.		
	Work phone.		
	Work extension.		
	Daytime phone (table)		
	Mobile phone.		
	Pager number.		
	Fax number.		
	E-mail address.		