

Client Tax Organizer

provided courtesy of

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Instructions:

- **Save** this PDF file to your computer hard drive or storage device.
- **Fill** in the fields that apply to your situation; re-saving the file periodically as you go.
- **Print** out the organizer when you have completed it.
- **Bring** it to our office at your scheduled tax appointment.
- **Notes:**
 - For your identity protection, we strongly urge you NOT to email this file to us once it is completed. Most email programs are unencrypted and have security vulnerabilities.
 - If you prefer to handwrite your information on this form, simply print it out, fill it in, and bring it with you to your next tax appointment.