

Tax Year 2020

Client Tax Organizer

Tax Return Appointment: Date: _____ **Time:** _____ PM

Please complete this Organizer before your appointment. Include all statements (W-2s, 1099s, etc.)

*****RECOVERY REBATE***** SIMULUS Check Amount(s) Summer 2020\$ _____ January 2021 \$ _____

1. Personal Information		Taxpayer		Spouse		
First name & Initial						
Last name						
Driver's License Number	Issue Date	Exp Date		Issue Date	Exp Date	
Social Security number						
Date of birth						
Occupation						
E-mail address						
Work phone	Cell		Work	Cell		
Home phone	Fax		Home	Fax		
Address				Apt/Suite		
City				State	ZIP	

Taxpayer Legally Blind Yes No Spouse Legally Blind Yes No
 Taxpayer Disabled Yes No Spouse Disabled Yes No
 Pres. Campaign Fund (Taxpayer) Yes No Pres. Campaign Fund (Spouse) Yes No
Filing status: Single Head of Household Married filing joint Married filing separate Widower Year of Spouse death? _____

2. Dependents (Children & Others)							
Name	Relationship	Date of Birth	Social Security Number	Months Lived With You	Disabled	Full Time Student	Dependent's Gross Income

Please answer the following questions to determine maximum deductions:

- | | |
|--|--|
| 1. Did your marital status change during the year? <input type="checkbox"/> Yes <input type="checkbox"/> No | 13. Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. Did your address change during the year? <input type="checkbox"/> Yes <input type="checkbox"/> No | 14. Did you give a gift of more than \$15,000 to one or more people? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 3. Were there any changes in dependents? <input type="checkbox"/> Yes <input type="checkbox"/> No | 15. Did you go through bankruptcy, foreclosure, or repossession proceedings? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4. Did you receive unreported tip income of \$20 or more in any month? <input type="checkbox"/> Yes <input type="checkbox"/> No | 16. Did you incur a loss because of damaged or stolen property? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 5. Did you receive any unemployment or disability income? <input type="checkbox"/> Yes <input type="checkbox"/> No | 17. Were you notified or audited by either the IRS or State taxing agency? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 6. Did you buy or sell any stocks, bonds or other investment property? <input type="checkbox"/> Yes <input type="checkbox"/> No | 18. Did you work from a home office or use your car for business? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 7. Did you purchase, sell, or refinance your principal home or second home, or take out a home equity loan? <input type="checkbox"/> Yes <input type="checkbox"/> No | 19. May the IRS discuss your tax return with your preparer? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 8. Did you convert part or all of your traditional/SEP/SIMPLE IRA to a ROTH IRA? <input type="checkbox"/> Yes <input type="checkbox"/> No | 20. Were you a citizen of, have income from, or live in a foreign country? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 9. Could you be claimed as a dependent on another person's tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No | 21. Did you own or have interest in any foreign assets or accounts, or have signature authority with any foreign financial accounts? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 10. Did you pay anyone for domestic services in your home? <input type="checkbox"/> Yes <input type="checkbox"/> No | 22. Do you want to electronically file your tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 11. Did you pay anyone for childcare services? <input type="checkbox"/> Yes <input type="checkbox"/> No | 23. Did you buy any internet merchandise for which you did not pay sales/use tax? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 12. Did you pay tuition or other education expenses for yourself or a dependent? (Attach Form 1098-T) <input type="checkbox"/> Yes <input type="checkbox"/> No | 24. Health Insurance. Did you have ACA compliant health insurance during the year? (Attach Form 1095-A, 1095-B, and/or 1095-C) <input type="checkbox"/> Yes <input type="checkbox"/> No |

13. Medical/Dental Expenses

Medical insurance premiums (paid by you) . . . _____
Long Term Care insurance _____
Prescription drugs _____
Glasses, contacts _____
Hearing aids, batteries _____
Braces _____
Medical equipment, supplies _____
Nursing care _____
Medical therapy _____
Hospital _____
Doctor/Dental/Orthodontist _____
Mileage _____

14. Taxes Paid

Real property tax (attach bills) _____
Personal property tax _____
Other: _____

15. Interest Expense

Mortgage interest paid (attach 1098's) _____
Interest paid to individual for your home
(attach amortization schedule) _____
Paid to:
Name _____
Address _____
Social Security No. _____
Investment interest _____

16. Casualty/Theft Loss

For property damaged by storm, water, fire, accident, or stolen.
Location of property _____
Description of property _____
Amount of damage _____
Insurance reimbursement _____
Repair costs _____
Federal grants received _____

17. Estimated Tax Payments

	Federal Amount	State Amount
LY - Jan 15	_____	LY - Jan 15
Q1 - Apr 15	_____	Q1 - Apr 15
Q2 - Jun 15	_____	Q2 - Jun 15
Q3 - Sep 15	_____	Q3 - Sep 15
Q4 - Jan 15	_____	Q4 - Jan 15

18. Charitable Contributions (receipts required)

Church _____
United Way _____
Scouts _____
Telethons _____
University, Public TV/Radio _____
Heart, Lung, Cancer, etc. _____
Wildlife Fund., Humane society _____
Salvation Army, Goodwill _____
Other: _____
Non-Cash _____
Address _____
City/State/Zip _____
Value of goods (attach list if more than one) _____
Volunteer mileage _____

19. Miscellaneous/Unreimbursed Expenses

Dues - union, professional _____
Books, subscriptions, supplies _____
Licenses _____
Tools, equipment, safety equipment _____
Uniforms (including cleaning) _____
Sales expense, gifts _____
Tuition, Books (work related) _____
Entertainment _____
Tax preparation fee _____
Safe deposit box _____
IRA custodial fees _____
Investment periodicals, advisory fees _____
Job search expense _____
Moving of household goods (job related) _____
Other: _____
Other: _____

20. Day Care Expense (Form 2441)

Provider _____ #1
Address _____
City/State/ZIP _____
EIN/SS# _____ Amt Pd _____
Phone number _____
Provider #2 _____
Address _____
City/State/ZIP _____
EIN/SS# _____ Amt Pd _____
Phone number _____
Children cared for _____

