

2020 INCOME TAX ORGANIZER

Taxpayer's Name				Social Security Number			
Spouse's Name				Social Security Number			
Taxpayer's Occupation			Date of Birth (D.O.B.)			Blind?	
Spouse's Occupation			Date of Birth (D.O.B.)			Blind?	
Address					e-mail address		
City		State	Zip	Home Phone		Work Phone	

DEPENDENT CHILDREN (who lived with you more than 6 months)

1) Name		Social Security No.	D.O.B.	2) Name		Social Security No.	D.O.B.
3) Name		Social Security No.	D.O.B.	4) Name		Social Security No.	D.O.B.

OTHER DEPENDENTS

1) Name		Social Security	Time at home	Relationship	Income	Support by you	Support by dependent & others
2) Name		Social Security	Time at home	Relationship	Income	Support by you	Support by dependent & others

THINGS TO BRING (if applicable):



- Last Year's Tax Return (if new client)
- W-2 Form(s) for Wages
- 1099 Form(s) for Interest, Dividends, Retirement, Social Security, Unemployment, & Other Income
- Amount of EIP (aka "stimulus") Received
- IRA Year-end Statements
- K-1s from Partnerships, Corporations or Estates
- Statements for Assets Held Outside the USA
- Cryptocurrency (e.g. Bitcoin) Sales/Earnings
- Business/Rental/Farm Income & Expenses
- Records of Estimated Taxes Paid
- HSA forms (1099-SA & 5498-SA)
- Childcare Provider Information
- Property Tax Statements
- 1098 Form(s) - Mortgage Interest, Tuition, Student Loans, Vehicle/Boat Donations
- Closing Papers for Purchases & Sales (including purchase and sale dates & amounts)
- All Other Statements Showing Income
- Charitable Contribution Details
- Last Pay Stub of the Year
- Voided Check for Direct Deposit
- Form(s) 1095 - Health Insurance
- Copy of Driver's License for Taxpayer & Spouse
- Copy of Social Security Card for New Family Members
- Pandemic Related Business Loans/Credits (bring details)

<p>RENTAL/SELF-EMPLOYMENT/FARM INCOME (see reverse for expenses)</p> <p>Landlords (rents received) \$ _____</p> <p>Self-employment (total received) \$ _____</p> <p>Farm income (total received) \$ _____</p> <p>PANDEMIC RELATED BUSINESS LOANS/CREDITS</p> <p>Amount of PPP Loan Forgiven \$ _____</p> <p>EIDL Loan Advance Payment \$ _____</p> <p>Employee Retention Credits \$ _____</p> <p>SALE OF STOCK OR OTHER PROPERTY</p> <table style="width:100%;"> <tr> <td style="width:33%;"><u>Item:</u></td> <td style="width:33%;"><u>Cost:</u></td> <td style="width:33%;"><u>Sale:</u></td> </tr> <tr> <td>_____</td> <td>\$ _____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> <td>\$ _____</td> </tr> <tr> <td>_____</td> <td>\$ _____</td> <td>\$ _____</td> </tr> </table> <p>OTHER INCOME</p> <p>Wages (forms W2)..... \$ _____</p> <p>Interest (forms 1099-INT)..... \$ _____</p> <p>Dividends (forms 1099-DIV)..... \$ _____</p> <p>Tips..... \$ _____</p> <p>Child Care..... \$ _____</p> <p>Retirement (forms 1099-R)..... \$ _____</p> <p>Roth Conversions..... \$ _____</p> <p>Jury Duty..... \$ _____</p> <p>Election Judging..... \$ _____</p>	<u>Item:</u>	<u>Cost:</u>	<u>Sale:</u>	_____	\$ _____	\$ _____	_____	\$ _____	\$ _____	_____	\$ _____	\$ _____	<p>OTHER INCOME (cont.)</p> <p>Census Work..... \$ _____</p> <p>EIP ("stimulus") Received..... \$ _____</p> <p>Gambling Winnings..... \$ _____</p> <p>Unemployment (1099-G)..... \$ _____</p> <p>Alimony Received..... \$ _____</p> <p>Prizes/Awards..... \$ _____</p> <p>Scholarships & Fellowships..... \$ _____</p> <p>Debt Cancellation..... \$ _____</p> <p>Partnerships & S-Corporations.... \$ _____</p> <p>Estates & Trusts..... \$ _____</p> <p>Social Security/RR Retirement.... \$ _____</p> <p>State Tax Refunds..... \$ _____</p> <p>Royalties (music/writing/other)..... \$ _____</p> <p>Sick Pay &/or Disability..... \$ _____</p> <p>Veteran's Payments..... \$ _____</p> <p>Withdrawals from HSA/MSA..... \$ _____</p> <p>Hobby Income..... \$ _____</p> <p>Odd Jobs/Side Jobs..... \$ _____</p> <p>Research/Survey/Online..... \$ _____</p> <p>Insurance Claims/Lawsuits..... \$ _____</p> <p>Public Assistance..... \$ _____</p> <p>Barter..... \$ _____</p> <p>Foreign Income..... \$ _____</p> <p>Cryptocurrency sales/earnings..... \$ _____</p> <p>All Other Income..... \$ _____</p>
<u>Item:</u>	<u>Cost:</u>	<u>Sale:</u>											
_____	\$ _____	\$ _____											
_____	\$ _____	\$ _____											
_____	\$ _____	\$ _____											

* Bring statements if available. Double-check 'online' accounts that don't send paper statements (e.g. brokerage, HSA, tuition, etc.).

Potential Deductions and Credit Items

ADJUSTMENTS

Payments to an IRA Traditional Roth
 Taxpayer Amount \$ _____ SEP SIMPLE
 Spouse Amount \$ _____

Penalty for Early Withdrawal

Alimony Paid \$: _____ SS#: - -

Self-Employed Health Insurance

Student Loan Interest

Payments to HSA/MSA: Taxpayer _____ Spouse _____

Classroom Materials for Educators

MEDICAL EXPENSES

Insurance & Medicare (not pretax)
 Long Term Care Insurance
 Prescriptions.....
 Eyeglasses, Hearing Aids & Batteries
 Doctors
 Dentists.....
 Hospital / Ambulance.....
 Auto Mileage..... miles
 Other Medical Expenses, Travel.....
 Reimbursement
 Did you receive reimbursement at work? _____

TAXES

Real Estate Taxes
 State taxes paid in '20 for '19 or earlier
 Sales tax paid on vehicles, boats, planes.....
 Sales tax paid (from receipts)

2020 State Tax Estimates

date pd. \$ _____ date pd. \$ _____
 date pd. \$ _____ date pd. \$ _____

2020 Federal Tax Estimates

date pd. \$ _____ date pd. \$ _____
 date pd. \$ _____ date pd. \$ _____

Vehicle License Tabs, Pers. Prop. Tax.....

INTEREST EXPENSE

Home Mortgage—Paid to Financial Institutions (Form 1098)
First Mortgage/Refinance.....
Loan Origination Fee/Discount Fee
Second Mortgage.....
Home Equity.....
Equity loan used only to buy/build/improve home? Y N
 Mortgage Insurance
 Second Home Interest Payments.....
 Home Mortgage—Pd. to Individuals.....
 (name, address, Social Security number)
 Investment Interest: *Margin Account*.....
Other Investment Interest.....

OTHER MISCELLANEOUS EXPENSES

Gambling Losses.....
 Impairment Related Work Expenses.....

HIGHER EDUCATION EXPENSES

Post Secondary Tuition/Req. Fees Paid
 Date: _____ Year in School

Please sign here _____ date _____

CONTRIBUTIONS

Churches (received)
 Other Contributions of Money (received)
 Charitable Auto Mileage.....
 Volunteer Expenses (received).....
 Property Donated (for which you have receipts)
 Fair market value (bring documentation if over \$500).....
 Auto, Boat Donations (Form 1098C)
 Qualified Charitable Distribution from IRA? ___Y___N (bring details)

CASUALTY & THEFT LOSSES

Cost of Property Lost
 Fair Market Value of Property
 Insurance Reimbursement Received.....
 Federally Declared Disaster Area? ___Y___N (bring details)

AUTOMOBILE EXPENSE

Total Miles
 Business Miles
 Commuting Miles
 Personal Miles
 Jan. 1, 2020, Odometer Beginning:....
 Dec. 31, 2020, Odometer Ending:.....
 Gas & Oil.....
 Interest.....
 Tolls & Local Transportation
 Lease Payments
 Parking.....
 Other:

BUSINESS EXPENSES

Taxes
 Utilities
 Insurance
 Repairs
 Supplies
 Business Meals
 Business Travel.....
 Advertising
 Professional Dues/Memberships.....
 Legal/Professional Fees
 Wages (bring copies of W2s/941s if they have been filed)
 Contract Labor.....
 Equipment (bring a list with details).....
 Other:

Is your primary place of business in your home? If yes, bring all home related expenses, total square footage and square footage of space that is exclusively and regularly used for business.

CHILD CARE EXPENSES

Names, addresses, and ID#s of provider(s), amount paid.

 Do you have a dependent care benefit plan at work? _____

ADOPTION EXPENSES

Amount Paid: _____ Date Finalized: _____ (bring papers)

ENERGY CREDITS / PLUG-IN VEHICLE

(BRING RECEIPTS AND DETAILS)

Solar Wind Geothermal Plug-in Vehicle