

2021 Individual Taxpayer Organizer

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Please complete all sections of the organizers so we can ensure we have current information , even if there is no change.

| | | | | | |
|------------------|--|--------------|---------------------------------|------------------|--|
| Taxpayer | | | | SSN | |
| <i>First</i> | <i>M.I.</i> | <i>Last</i> | Email | <i>IP PIN</i> | |
| Occupation | Date of birth <small>MM/DD/YY</small> | | Are you new to our firm? Yes No | | |
| Address | City | | State | Zip | |
| County | Home phone | | Work or cell | | |
| Driver's License | <i>No.</i> | <i>State</i> | <i>Issue Date</i> | <i>Exp. Date</i> | |

| | | | | | |
|--|--|--------------|---------------------------------|------------------|--|
| Spouse | | | | SSN | |
| <i>First</i> | <i>M.I.</i> | <i>Last</i> | Email | <i>IP PIN</i> | |
| Occupation | Date of birth <small>MM/DD/YY</small> | | Are you new to our firm? Yes No | | |
| Address <small>(If different from Taxpayer)</small> | City | | State | Zip | |
| County | Home phone | | Work or cell | | |
| Driver's License | <i>No.</i> | <i>State</i> | <i>Issue Date</i> | <i>Exp. Date</i> | |

Do you have an IRS Identity Protection PIN as a result of Identity Theft? Yes No Do you rent or own your home? Own or Rent

If you moved during 2021, enter your previous address. Date of move

State information: States of residence during 2021 and dates From _____ to _____ MM/DD/YY

School district _____ County _____

Marital status at 12/31/2021 Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure

Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No

Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.

Have you received any notice from the IRS or state revenue department within the past year? Yes No

| Names of dependent children <small>Child's full name</small> | Social Security # | IP PIN | Date of birth <small>MM/DD/YY</small> | Months lived in home in 2020 | Relationship | College student? |
|---|-------------------|--------|--|------------------------------|--------------|------------------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| Other dependents or people who lived with you | Social Security # | IP PIN | Date of birth <small>MM/DD/YY</small> | Months lived in home in 2020 | Relationship | Income |
|---|-------------------|--------|--|------------------------------|--------------|--------|
| | | | | | | |
| | | | | | | |

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2020? Yes No

Do any of the children have a disability? Yes No

Did any of the children have any income above \$1,100 for the year? Yes No

Questions - All Taxpayers (Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse - enter "?" If unsure about a question.

| | | | |
|-------------------------|-----------|----|--|
| INVESTMENTS | Yes | No | Did you roll over any amounts from a retirement account during the year? If yes, please provide details. |
| | Yes | No | Did you sell or transfer any stock or investment property? If yes, please provide details or statements. |
| | Yes | No | Did you, or will you, contribute any money to a Retirement account for the year? (circle types provide IRA amounts) 401K / 403B Traditional IRA: Taxpayer ____ / Spouse ____ Roth IRA Taxpayer ____ / Spouse ____ |
| | Yes | No | Did you receive any income from an installment sale? |
| | Yes | No | Did you have any investments become worthless or were you a victim of investment theft? Provide details |
| | Yes | No | Were you granted, or did you exercise, any employee stock options during the year? |
| | Yes | No | Did you engage in any Bit-Coin or other virtual currency transactions? If so, please provide details and statements. (includes any type of transactions, buy, sell, gifts, ..etc) |
| HOME | Yes | No | Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details. |
| | Yes | No | Did you pay sales taxes on a major purchase , such as a vehicle, boat, motorcycle, or home? provide receipts |
| | Yes | No | Did you make any charitable contributions? Please provide all statements. |
| | Yes | No | Did you have any uninsured loss to your property in a Federally Declared Disaster Area? |
| | Yes | No | Did you purchase or sell a main home during the year? If yes, provide closing statement and Form 1099-S. |
| | Yes | No | Did you refinance a mortgage or take a home equity loan? (Provide closing statement & details of what loan proceeds were used for) |
| OTHER DEDUCTIONS | Yes | No | Is either spouse a teacher, instructor, counselor, principal or aid for a K-12 school and work at least 900 hours during the year? If yes, please provide total expenses for books/supplies not reimbursed by employer |
| | Enter amt | | Taxpayer _____ Spouse _____ |
| | Yes | No | Did you claim the First-Time Homebuyer Credit when you purchased your home? (\$7500 loan; homes purchased in 2008) |
| | Yes | No | Did you purchase a new energy-efficient car, truck, or van? Electric or Hybrid please provide purchase documents |
| | Yes | No | Did you make any new energy-efficient improvements to your home such as solar, HVAC, Water heater? Provide Details |
| BUSINESS | Yes | No | Do you own a business or an interest in a partnership, corporation, LLC, farming activities or other venture? |
| | Yes | No | If yes, did you complete the appropriate business worksheet, Corporation, Farm, or Sole Proprietorship? |
| | Yes | No | Did you receive income from a sharing/gig economy activity (e.g Airbnb, Uber, Door Dash etc.) |
| | Yes | No | Do you own rental property? If yes, please complete the rental worksheet. |
| | Yes | No | Did you make estimated tax payments during the year? If yes, provide details on the next page. |

Additional Notes / Comments we should be aware of:

Dependency Worksheet

(complete if claiming children, parents or other individuals as a dependent, use additional sheets as necessary)

Taxpayer Name: _____ Spouse Name: _____

List complete names of each dependent (child, parent, or other dependent) claimed on your return. Use additional sheets as necessary.

Is each dependent a U.S. Citizen, U.S. National, or U.S. Resident Alien? Yes No Yes No

Relation of each dependent (if adopted, please provide dates) _____

How many months (or days) did each dependent reside in your home? _____

(see note1) _____

Total income received by dependent (including Social Security, investment, and other income) _____

Did you provide more than half the support for the dependent for the entire year? Yes No

Are you, or spouse, self-employed or receive any income from services or jobs you perform. (includes ride share, delivery, or other income producing activities) Yes No

1. Were all children claimed on this year's return natural born to both parents listed on this return, and no divorced or separated parents situation, or other claims to dependency applies? Yes No or NA

2. Can you provide documents to support your answer if requested by the IRS? (school or medical records showing residence of dependent) Yes No

3. Have you ever been denied earned income credit or child tax credit in the past? Explain. Yes No

4. Are you filing as Single or Head or Household? (Married filing jointly circle "no") Yes No

If dependent is your parent, or children and you answered "YES" to 1 and 2, and "NO" to 3 and 4 above, STOP HERE and sign the bottom.

Is the dependent a qualifying child of another taxpayer? **(see note2)** Yes No Yes No

If yes, please list who _____

Which parent has the highest adjusted gross income? _____

If child did not live in your home for the entire year, do you have a Form 8332 signed by the custodial parent? Yes No Yes No

If child resides in your home, did you release the custody to another parent for the year to allow them to claim the child? Yes No Yes No

Please provide a copy of school, daycare records, or other equivalent document with child's name and same address. (type of record) _____
(type of record provided) (type of record provided)

Note 1: Child must live with taxpayer for more than half the year. If child lives with both parents who are separated, then the custodial parent is determined by the number of days (nights) at each parents house. If child lives with parents equally, the IRS will treat the child as the qualifying child of the parent who had the higher adjusted gross income for the year

Note 2: Qualifying child of more than one person: Even if a child meets the conditions to be the qualifying child of more than one person, only one person can claim the child as a qualifying child for all of the following tax benefits, unless the special rule for Children of divorced or separated parents applies:

- | | |
|------------------------------------|---|
| 1. Dependency exemption | 4. Credit for child and dependent care expenses |
| 2. Child tax credits | 5. Exclusion for dependent care benefits |
| 3. Head of household filing status | 6. Earned income credit |

 Taxpayer's Signature Date Spouse's Signature Date

Estimated Tax Payments—Tax Year 2020

| <i>Installment</i> | <i>Date paid</i> MM/DD/YY | <i>Federal (amount)</i> | <i>Date paid</i> MM/DD/YY | <i>State (amount)</i> |
|---------------------------------------|---------------------------|-------------------------|---------------------------|-----------------------|
| First | | \$ | | \$ |
| Second | | \$ | | \$ |
| Third | | \$ | | \$ |
| Fourth | | \$ | | \$ |
| Amount applied from 2019 overpayment? | | \$ | | \$ |
| Total | | \$ | | \$ |

Tax Preparation Checklist

Please provide the following documentation:

All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.

Form 1095-A (for health insurance purchased through a public exchange)

If you are a new client, provide copies of last year's tax returns.

The completed Individual Income Tax Organizer and Engagement letter for current year.

Copy of the closing statement if you bought or sold real estate.

Copy of all acknowledgement letters received from charitable organizations for contributions made during the tax year.

Completed dependency worksheet if you are claiming any dependents on your return, including children, parents, or other dependents

Please note: For charitable deductions, we are required to have a copy of acknowledgement letters for charity donations of \$250 or more, as well as, additional reporting requirements for non-cash donations (Goodwill, Salvation Army). For more information on the charity requirements you can view our website downloads page and click on the charity form.

Any applicable worksheets for personal deductions or business deductions (rental worksheet/sole proprietor worksheets)