

# 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)

### RENTAL/SELF-EMPLOYMENT/FARM INCOME

(see reverse for expenses)

Landlords (rents received) \$ \_\_\_\_\_  
 Self-employment (total received) \$ \_\_\_\_\_  
 Farm income (total received) \$ \_\_\_\_\_

### PANDEMIC RELATED BUSINESS LOANS/CREDITS

Amount of PPP Loan Forgiven \$ \_\_\_\_\_  
 EIDL Loan Advance Payment \$ \_\_\_\_\_  
 Employee Retention Credits \$ \_\_\_\_\_

### SALE OF STOCK OR OTHER PROPERTY

Item:	Cost:	Sale:
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

**OTHER INCOME** \$ \_\_\_\_\_  
 Wages (forms W2)..... \$ \_\_\_\_\_  
 Interest (forms 1099-INT)..... \$ \_\_\_\_\_  
 Dividends (forms 1099-DIV)..... \$ \_\_\_\_\_  
 Tips..... \$ \_\_\_\_\_  
 Child Care..... \$ \_\_\_\_\_  
 Retirement (forms 1099-R)..... \$ \_\_\_\_\_  
 Roth Conversions..... \$ \_\_\_\_\_  
 Jury Duty..... \$ \_\_\_\_\_  
 Election Judging..... \$ \_\_\_\_\_

### OTHER INCOME (cont.)

Census Work..... \$ \_\_\_\_\_  
 EIP ("stimulus") Received..... \$ \_\_\_\_\_  
 Gambling Winnings..... \$ \_\_\_\_\_  
 Unemployment (1099-G)..... \$ \_\_\_\_\_  
 Alimony Received..... \$ \_\_\_\_\_  
 Prizes/Awards..... \$ \_\_\_\_\_  
 Scholarships & Fellowships..... \$ \_\_\_\_\_  
 Debt Cancellation..... \$ \_\_\_\_\_  
 Partnerships & S-Corporations.... \$ \_\_\_\_\_  
 Estates & Trusts..... \$ \_\_\_\_\_  
 Social Security/RR Retirement.... \$ \_\_\_\_\_  
 State Tax Refunds..... \$ \_\_\_\_\_  
 Royalties (music/writing/other).... \$ \_\_\_\_\_  
 Sick Pay &/or Disability..... \$ \_\_\_\_\_  
 Veteran's Payments..... \$ \_\_\_\_\_  
 Withdrawals from HSA/MSA..... \$ \_\_\_\_\_  
 Hobby Income..... \$ \_\_\_\_\_  
 Odd Jobs/Side Jobs..... \$ \_\_\_\_\_  
 Research/Survey/Online..... \$ \_\_\_\_\_  
 Insurance Claims/Lawsuits..... \$ \_\_\_\_\_  
 Public Assistance..... \$ \_\_\_\_\_  
 Barter..... \$ \_\_\_\_\_  
 Foreign Income..... \$ \_\_\_\_\_  
 Cryptocurrency sales/earnings..... \$ \_\_\_\_\_  
 All Other Income..... \$ \_\_\_\_\_

\* 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