

# 2020 TAX DEDUCTION FINDER

Your Name \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_  
 Spouse's Name \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_  
 Your Occupation \_\_\_\_\_ Date of Birth \_\_\_\_\_ Home Phone \_\_\_\_\_  
 Spouse's Occupation \_\_\_\_\_ Date of Birth \_\_\_\_\_ Work Phone \_\_\_\_\_  
 Address \_\_\_\_\_ eMail \_\_\_\_\_

**DOCUMENTS TO BRING:** ▶ Last year's return (if new client) ▶ W-2 Forms ▶ Purchase & sale info for all property sold  
 ▶ 1099 Forms for: interest · dividends · soc. sec. · unemployment · self-employment · debt cancellation · retirement · HSA/MSA  
 ▶ 1098 Forms for: mortgage interest · tuition · student loan interest · auto/boat donations ▶ Health insurance (form 1095)  
 ▶ Foreign account statements ▶ Bitcoin & other cryptocurrency account details ▶ Other documents referenced in following pages

	FEDERAL	STATE	<b>DEPENDENTS</b>				
Last year I received refunds of:	_____	_____	Name	Number of months lived in your home ▼			
Last year I had to pay:	_____	_____	First, Initial & Last	Social Security # (required)	Relationship	Birthdate	Grade
<input type="checkbox"/> I want my refunds directly deposited into my bank, IRA ... (bring a voided check / account info)							

## INCOME (other than income shown on W-2s)

SOURCE (include foreign income)	T/S/J	AMOUNT
INTEREST (Bring in 1099s or Statements)		
If Individual, list Name, Address & Soc. Sec. #		
Include all tax exempt and Municipal Bonds		
Excludable Series EE Savings Bonds		

SOURCE (include foreign income)	T/S/J	AMOUNT
DIVIDENDS (Bring in 1099s or Statements)		
Include all tax exempt		

### OTHER INCOME NOT INCLUDED ABOVE OR ON W-2 (see page 4 for self-employment & rental income details)

UNEMPLOYMENT (Bring in 1099)		
ALIMONY		
TIPS		
COMMISSIONS/BONUSES		
PRIZES/AWARDS/GAMBLING/LOTTERY		
JURY/ELECTION DUTY		
PARTNER./CORP/ESTATE/TRUST (Bring K-1)		
STOCK & PROPERTY SALES (Bring 1099, Cost, Dates)		
SCHOLARSHIPS/FELLOWSHIPS, if not on W-2		
STRIKE PAY		
BUSINESS/FARM/RENTAL (details on page 4)		
FOREIGN INCOME		
HOBBY INCOME		
OTHER INCOME (please specify)		

PERSONAL INJURY AWARDS		
DISABILITY/RETIREMENT		
PENSIONS / IRAs (Bring all 1099-R forms)		
SOCIAL SECURITY (Bring in SSA-1099)		
SOCIAL SECURITY (Bring in SSA-1099)		
RAILROAD RETIREMENT (Bring in RRB-1099)		
RAILROAD RETIREMENT (Bring in RRB-1099)		
DEBT CANCELLATION – BRING 1099-C or A		
BITCOIN / CRYPTOCURRENCY (bring details)		

### NON-TAXABLE INCOME

VETERANS PENSION/DISABILITY		
CHILD SUPPORT/ASSISTANCE		
WORKER'S COMPENSATION		
EIP (a.k.a. "stimulus") AMOUNT RECEIVED		

ESTIMATE PAYMENTS PAID IN/FOR 2020			FEDERAL			STATE		
	Date Paid	Check #	Amount	Date Paid	Check #	Amount		
4th Qtr. Prior Year								
1st Qtr. This Year								
2nd Qtr. This Year								
3rd Qtr. This Year								
4th Qtr This Year								

### RETIREMENT PLANS

If you or your spouse has an IRA, SEP, SIMPLE or Keogh Retirement Plan, list the amount you have contributed for 2020 and the date of contribution.

**IRA:** Regular  Roth  You \$ \_\_\_\_\_ Date \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Date \_\_\_\_\_

**SEP:** ..... You \$ \_\_\_\_\_ Date \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Date \_\_\_\_\_

**Keogh:** ..... You \$ \_\_\_\_\_ Date \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Date \_\_\_\_\_

**SIMPLE:** ..... You \$ \_\_\_\_\_ Date \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Date \_\_\_\_\_

If amount listed is not the maximum, do you want to contribute the maximum deductible amount? Yes \_\_\_\_\_ No \_\_\_\_\_

Did you convert any funds from a regular IRA to a Roth IRA? You \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_

### MEDICAL SAVINGS ACCOUNTS (MSAs) / HEALTH SAVINGS ACCOUNTS (HSAs)

Amount Contributed: You \_\_\_\_\_ Spouse \_\_\_\_\_ Amount withdrawn for Qualified Expense \_\_\_\_\_

Amount of Insurance Deductible \_\_\_\_\_ Type of Plan: Single \_\_\_\_\_ Family \_\_\_\_\_



**CHILD and DEPENDENT CARE** ▶ *If you or your spouse paid for dependent care to be gainfully employed.*

Were the Dependent Care services performed in your home? Yes \_\_\_ No \_\_\_

Were you reimbursed by your employer for child care: Yes \_\_\_ No \_\_\_ If so \$ \_\_\_\_\_ Amount forfeited, if any \$ \_\_\_\_\_

*Even though your reimbursement equaled your child care expenses, you are required to show the following information on your tax return:*

Name(s) and Age(s) \_\_\_\_\_  
of Dependents \_\_\_\_\_

Name(s) of Individual/Organization Who Provided Care	Address: Number, Street City, State & Zip	Social Security or Employer ID Number	Amount Paid In 2020

▶ If more space is needed, attach statement.

▶ You cannot take a credit for amounts paid to your dependent.

**EDUCATION CREDITS, DEDUCTIONS**

Tuition and required fees you paid for yourself, your spouse or dependent(s) for post-secondary education \$ \_\_\_\_\_ Date Paid \_\_\_\_\_

Date education began \_\_\_\_\_ Student's Name \_\_\_\_\_ Degree Program? Yes \_\_\_ No \_\_\_

Was the student enrolled at least half time? \_\_\_ Year in School -- Fr / So / Jr / Sr / Graduate **(please bring 1098-T)**

YES

**PLEASE CHECK ALL APPLICABLE QUESTIONS**

- \_\_\_ Are you being claimed as a dependent on another Tax Return?
- \_\_\_ Do any of your dependents have earned income or investment income? Bring details for each dependent.
- \_\_\_ Did you change your marital status during the year? If yes, date \_\_\_\_\_
- \_\_\_ Are you paying towards the support of a relative other than dependents claimed above, and if so, what is their *taxable* income?
- \_\_\_ Did you or your spouse become disabled or legally blind during the tax year?
- \_\_\_ Did you purchase a business vehicle or other business equipment during the year? If yes, bring details.
- \_\_\_ Are you making payments on a boat or recreational vehicle that has a toilet, sleeping and basic living facilities?
- \_\_\_ Have you received an income statement on your Social Security # which is reported on another tax return?
- \_\_\_ Do you have a non-collectible debt? If so, bring details.
- \_\_\_ Are you involved in bartering your services or property for other services or property?
- \_\_\_ Do you have income, expenses or deductions not mentioned in this organizer? Bring details.
- \_\_\_ Did you pay someone who performed services as an employee at your home in 2020?
- \_\_\_ Were you notified by the IRS or State of any change in a prior year's tax return? Bring notice.
- \_\_\_ Do you (and/or your spouse) wish to designate \$3.00 to the Presidential Election Fund? Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_
- \_\_\_ In 2020, did you pay adoption fees, court costs, attorney fees and/or other expenses directly related to an adoption?  
Amount \_\_\_\_\_ Was it finalized? \_\_\_\_\_ Was the adoption international? \_\_\_\_\_ Special Needs Child? \_\_\_\_\_
- \_\_\_ Did you receive combat pay in 2020?
- \_\_\_ Did you have debts canceled or forgiven? Bring the 1099-C or 1099-A.
- \_\_\_ Did you buy or sell a home in 2020 or did you refinance? Bring the settlement statement.
- \_\_\_ Did you distribute/spend funds from an HSA? Bring from 1099-SA.
- \_\_\_ Did you contribute to a 529 education savings plan (for yourself or others). If yes, how much in 2020 ? \_\_\_\_\_
- \_\_\_ Did you distribute/spend funds from a 529 plan in 2020? Bring form 1099-Q and details about qualifying educational expenses.
- \_\_\_ Are you paying towards health insurance for a child under the age of 19, a full-time student under the age of 24, or, if disabled, an individual of any age? If yes, \$ \_\_\_\_\_
- \_\_\_ Did you enclose a copy of your 2020 Property Tax Statement for your principal residence? Is it paid? \_\_\_\_\_
- \_\_\_ Did you receive a \$7,500.00 First Time Homebuyer Credit for a purchase in 2008?
- \_\_\_ Do you have foreign accounts or assets? Bring details.
- \_\_\_ Did you earn or sell any Bitcoin and/or cryptocurrency (a.k.a. virtual currency)? Bring details.

QUESTIONS YOU WOULD LIKE TO ASK \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## BUSINESS / RENTAL / FARM INCOME & EXPENSES

Name of Business (if any) \_\_\_\_\_ Federal ID# (if any) \_\_\_\_\_

Address of Business/Property \_\_\_\_\_

Product Sold or Service Performed \_\_\_\_\_

### Income

<b>Gross Sales/Receipts</b>	Include all income, even if not reported on form 1099	
<b>Returns/Refunds</b>	Amount included in gross that was refunded to your clients	<ul style="list-style-type: none"> <li>Bring all form(s) 1099-MISC received. Do your records agree with the amount reported on form 1099-MISC? Y__ N__</li> <li>Did you receive \$10,000 in actual cash from any individual at any one time (or cumulative) during the year?</li> </ul>
<b>Other Income</b>	Directly related to your business	
<b>Pandemic Related Loans/Credits:</b> PPP Loan Total: \$ _____ PPP Loan Amount Forgiven: \$ _____ EIDL Advance Payment: \$ _____ Employee Retention Credits: \$ _____		

### Sale of Equipment, Machinery, Land, Buildings Held for Business Use

Kind of Property	Date Acquired	Date Sold	Gross Sales Price	Expenses of Sale	Original Cost

### Cost of Goods Sold

<b>*Purchase of Product &amp; Supplies for Resale:</b>		<b>Inventory at End of Year</b>
<b>*Cost of Labor:</b>		How did you arrive at your inventory value? Actual Cost <input type="checkbox"/> Other (explain):
<b>*Purchase of Materials for Jobs:</b>		Personal Use: Cost of inventory used by yourself or family \$ _____
<b>*Other-Costs (describe):</b>		

\*Do not list the same expense in more than one category

### Other Expenses

Advertising/Promotion		Repairs & Maintenance
Commissions & Fees		Supplies
Contract Labor		Taxes
Employee Benefits		Business Meals
Insurance		Gifts
Business Loan Interest		Utilities
Legal & Professional Fees		Wages (paid to employees)
Office Expenses		Equipment (describe items/costs on separate list)
Pension/Profit Sharing (employees only)		Other:
Rent		Business Related Casualty or Theft Losses? __Y__N (bring details)

### Automobile Expenses

### Office in Home

### Travel

	Vehicle #1	Vehicle #2	Date Acquired Home		Lodging	
Total Miles			Total Cost		Airfare	
Business Miles			Cost of Land		Auto Rental	
Commuting Miles			Cost of Improvements		Taxi/Uber/Lyft	
Personal Miles			Sq. Footage of Home		Bus/Train	
Jan. 1 2020 Odometer Beginning			Sq. Footage of Office Area		Meals (keep total separate from other costs)	
Dec. 31 2020 Odometer Ending			Rent Paid (if you rent)		Other (incidentals, laundry, etc.)	
Gas & Oil			Interest		Convention Fees	
Interest			Taxes		Travel (# of nights away)	
Tolls and Local Transportation			Utilities		City _____ Nights Out _____	
Lease Payments			Insurance		City _____ Nights Out _____	
Repairs & Maintenance			Repairs/Maintenance		City _____ Nights Out _____	
Other:			Other expenses:		City _____ Nights Out _____	

#### Checklist:

<input type="checkbox"/> Check all information and amounts listed to be sure of accuracy. <input type="checkbox"/> Enclose all W2s, Interest, Dividends, and other 1099s. If you received any correspondence or materials from the IRS or state, please bring them. <input type="checkbox"/> Enclose purchase/sales/contract agreements/closing papers. Dates are important!	<input type="checkbox"/> I consent to have the IRS discuss my tax return with my preparer <input type="checkbox"/> <b>TIMELY RECORDS</b> must be maintained to support deductions. Records must indicate who, what, why, where, and when. Check if you have receipts or log. I have reviewed this information and to the best of my knowledge it is correct. Please sign _____
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