



2021 Income Tax Organizer

Taxpayer Name		Occupation
Spouse's Name		Occupation
Address		
City	State	Zip Code
Email Address		Phone Number

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

Name	SSN (if new dependent)	DOB	School Grade	School expenses? Yes No	Daycare Expenses? Yes No
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Name	SSN (if new dependent)	DOB	School Grade	School expenses? Yes No	Daycare Expenses? Yes No

If yes, please attach receipts

If yes, please attached stmt

Amount you received for 2021 Economic Stimulus Payment \$ _____ Total Advanced Child Tax Credit Payments Received in 2021 \$ _____

Do you have any financial interest or signature authority over a foreign account? Yes No At any time during 2021, did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currency? Yes No

OTHER INFORMATION, CHANGES OR QUESTIONS YOU WOULD LIKE ADDRESSED:

Please sign below and return with your documents

SIGNATURE _____

DATE _____

THINGS WE NEED ✓

Bring with you, mail in or secure upload

Previous year tax return (If new client)	Closing papers for purchases & sales
W-2 Forms	Property Tax Statements
1099-R Retirement	1098 Forms - Mortgage Int, Tuition, Student Loans
1099 Forms for Interest, Dividends, Social Security, Unemployment	1099B Forms proceeds from Broker & Barter Exchanges
K-1s from Partnerships, Corporations or Estates	Proof of Health Insurance - Form 1095
Statements for Assets held outside the US	All other statements showing income
HSA Forms (1099-SA & 5498-SA)	IRS Letter 6419 - 2021 Advance Child Tax Credit)
1099 MISC	IRS Notice 1444-C Your 2021 Economic Impact Payment (stimulus)

OTHER INCOME

Rental/Self-Employment/Farm Income ? YES NO

If yes, please attach Income and Expenses

Roth Conversions	\$ -
Jury Duty/Election Judging	\$ -
Gambling Winnings	\$ -
Alimony Received	\$ -
Prizes/Awards	\$ -
Scholarships & Fellowships	\$ -
Debt Cancellation	\$ -
Partnerships and S-Corps	\$ -
Estates & Trusts	\$ -
State Tax Refunds	\$ -
Royalties	\$ -

Sick pay or Disability	\$ -
Veterans Payments	\$ -
Withdrawals from HSA/MSA	\$ -
Hobby Income	\$ -
Odd Jobs/Side Jobs	\$ -
Research, Survey, Online Income	\$ -
Insurance Claims/Lawsuits	\$ -
Public Assistance	\$ -
Barter	\$ -
Foreign Income	\$ -
Other	\$ -

ADJUSTMENTS, DEDUCTIONS & OTHER

IRAS			
Contributions		Type?	
Taxpayer	\$ -	Regular	Roth
Spouse	\$ -	Regular	Roth
Withdrawals		Type?	
Taxpayer	\$ -	Regular	Roth
Spouse	\$ -	Regular	Roth
Penalties for Early withdrawal? Yes No			

PROPERTY TAXES PAID	
Type	Amount
Primary Residence	\$ -
Second Home	\$ -
Vehicle	\$ -
Vehicle	\$ -
Other	\$ -

INTEREST EXPENSE	
Home Mortgage (Form 1098)	\$ -
First Mortgage/Refinance	\$ -
Loan Orig Fee/Discount Fee	\$ -
Second Mortgage	\$ -
Home Equity	\$ -
Equity only used to improve/build/improve home? Yes	
Mortgage Insurance (PIM)	\$ -
Second Home Interest	\$ -

CONTRIBUTIONS	
Churches (receipted)	\$ -
Other Money (receipted)	\$ -
Charitable Auto Miles	-
Volunteer Expenses	\$ -
Property Donated*	\$ -

*if over \$500 total of donated property, please attach details for each donation - donation organization and TIN, date of donation, value of property donated

ESTIMATED TAX PAYMENTS			
2021 Estimated Payments - Federal			
Date		Amount	\$ -
Date		Amount	\$ -
Date		Amount	\$ -
Date		Amount	\$ -
2021 Estimated Payments - State			
Date		Amt	\$ -
Date		Amt	\$ -
Date		Amt	\$ -
Date		Amt	\$ -

MEDICAL EXPENSES	
Insurance & Medicare (not pretax)	\$ -
Long Term Care	\$ -
Taxpayer	\$ -
Spouse	\$ -
Prescriptions	\$ -
Eyeglass, Hearing Aids, Batteries	\$ -
Doctors	\$ -
Dentists	\$ -
Hospital/Ambulance	\$ -
Medical Miles	\$ -
Other Medical Travel	\$ -
Reimbursements	\$ -

HSA/MSA	
Contributions	
Taxpayer	\$ -
Spouse	\$ -
Withdrawals	
Taxpayer	\$ -
Spouse	\$ -