

2020 Individual Taxpayer Organizer

Existing Clients - Previously Prepared your Return

Need to confirm the following items have NOT changed (initial each item):

Contact information-
Address, Phone and E-Mail _____

Marital Status _____
Dependents have NOT changed _____

Bank Account Information _____

(If no changes skip to next page)

Client would like:

____ Electronic Copy ____ Paper Copy ____ Both

____ Client Electronic Folder on Secure Client Portal to share and review documents electronically and provide Tax Returns electronically

New Clients

Need to Complete ALL information below and provide Copy of Drivers License

Taxpayer				SSN	
First	M.I.	Last	Email	IP PIN	
Occupation		Date of birth	Are you new to our firm? Yes No		
Address		City	State	Zip	
County		Home phone	Work or cell		
Driver's License No.		State	Issue Date	Exp. Date	

Spouse				SSN	
First	M.I.	Last	Email	IP PIN	
Occupation		Date of birth	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 No.		State	Issue Date	Exp. Date	

If you moved during 2020, enter your previous address.	Date of move
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Marital status at 12/31/20: 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 <i>Child's full name</i>	Social Security #	IP PIN	Date of birth	Months lived in home in 2020	Relationship to taxpayer	College student?

Did any of the children have unearned income above \$1,100 for the year? Yes No Do any of the children have a disability? Yes No
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2020? Yes No

Other dependents or people who lived with you						
Name	Social Security #	IP PIN	Date of birth	Months lived in home in 2020	Relationship	Income

Bank information: Use for	Direct deposit of refund	Direct debit of balance due	Name of bank
Checking	Savings	Routing transit number	Account number

Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.

Questions — All Taxpayers- (Enter "?" if unsure about a question we will follow up or help you with it)

"You" refers to both taxpayer and spouse — enter "?" if unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?			
	Yes	No	Did you pay or receive alimony in 2020? <i>Paid Received \$</i>	<i>Recipient's SSN</i>	<i>Date of divorce or separation</i>	
	Yes	No	Did you purchase health insurance through a public exchange (National Healthcare Plan Through Government)?			
	Yes	No	Did you have any distributions from HSA (Health Savings Account)? If so, Were they used for Healthcare ? Yes No			
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?			
	Yes	No	Did you pay anyone for domestic services in your home?			
	Yes	No	Did you purchase a new energy-efficient car, truck, or van?			
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?			
	Yes	No	Are you a member of the military?	State of residency		
	Yes	No	Were you a citizen of or lived in a foreign country?	Foreign country		
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? Balance exceeds \$50,000 Yes No			
	Yes	No	Did you receive an economic impact payment (Covid Recovery Payment-Stimulus Payments)? If so, provide the amounts.			
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? <i>Designee's name Phone number PIN (any five digits)</i>			
	CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2020? (Provide statement for other expenses.)		
Yes		No	Were any children attending college? <i>Year in college</i>	Paid by you: Tuition \$	Student loan interest \$	Books \$
				Paid by student: Tuition \$	Student loan interest \$	Books \$
Yes		No	Did you pay any tuition for a private school for a dependent or take classes yourself?			
			<i>Student</i>	<i>Amount paid \$</i>		
			<i>Name and address of school</i>			
Yes		No	Did you pay for child or dependent care so you could work or go to school? (add statement if needed)			
			<i>Name of provider</i>	<i>EIN or SSN</i>		
			<i>Address</i>	<i>Amount paid \$</i>		
Yes		No	Do you have any children who have unearned income of \$1,100 or more?			
Yes	No	Did you make any contributions to a 529 plan (State Education Savings Plan) in 2020?				
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2020?	Traditional IRA	Roth IRA	
	Yes	No	Did you roll over any amounts from a retirement account in 2020?			
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?			
	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 in 2020?			
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2020?			
	Yes	No	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?			
DEDUCTIONS	Yes	No	Did you, or do you plan to, contribute money before April 15, 2021 to a HSA for 2020? If yes, provide details.			
	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 in 2020, such as a vehicle, boat, or home?			
	Yes	No	Did you make any charitable contributions in 2020? If yes, provide details.			
BUSINESS	Yes	No	Did you work from a home office or use your car for business?			
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)			
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?			
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.			
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.			
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.			
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.			

State information Full-year resident Part-year resident Nonresident School district
States of residence during 2020 and dates Do you rent or own your home? Rent Own