

# 2021 Individual Taxpayer Organizer

**Existing Clients** (Prepared Prior Year Return)

- Confirm items have NOT Changed
- Complete Pages 2 and 3

**Confirm/Check No Changes to list below:**

Address            Marital Status  
Phone            E-Mail  
Dependents      Bank Account

**New Clients**

- Complete All Information below & Page 2 & 3
- Copy of Prior Year Tax Return
- Copy of Drivers License

Please note that any information **not complete or provided** could **delay** the processing of your Income Tax Return.

**Providing and Sharing Information**

Electronic Client Folder on Secure Client Portal to share and review documents electronically and provide Tax Returns and Information. (Required for Electronic Copies & Documents)

Accept use of Electronic Folder            Initials

**Income Tax Return Copy Preference**

Electronic Copy            Paper Copy

<b>Taxpayer</b>				SSN	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	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	

<b>Spouse</b>				SSN	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	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 2021, enter your previous address.	Date of move
--	--------------

Marital status at 12/31/21:    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 2021	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 2021?    Yes    No

**Other dependents or people who lived with you**

Name	Social Security #	IP PIN	Date of birth	Months lived in home in 2021	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 2021? <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	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 any economic impact payments (stimulus payments) during 2021? Date _____ If yes, provide the amount(s) and dates received. Advance Child Tax Credit on Page 3 Amount \$ _____				
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? <i>Designee's name</i> Roger D. Nickell CPA <i>Phone number</i> 816-305-5873 <i>PIN (any five digits)</i>				
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2021? (Provide statement for other expenses.)				
	Yes	No	Did you receive any advance Child Tax Credit payment? If yes, enter the amounts on last page. (Attach Letter 6419.)				
	Yes	No	Were any children attending college?	<i>Year in college</i>	Paid by you: Tuition \$	<i>Student loan interest \$</i>	<i>Books \$</i>
					Paid by student: Tuition \$	<i>Student loan interest \$</i>	<i>Books \$</i>
	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 in 2021? State Education Savings Plan Provide statement and/or Amount \$ _____					
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2021?		Traditional IRA	Roth IRA	
	Yes	No	Did you roll over any amounts from a retirement account in 2021?				
	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 2021?				
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2021?				
	Yes	No	Did you receive, sell, send, exchange, or otherwise dispose of any financial interest in any virtual currency?				
DEDUCTIONS	Yes	No	Did you, or do you plan to, contribute money before April 18, 2022 to an HSA for 2021? 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 2021, such as a vehicle, boat, or home?				
	Yes	No	Did you make any charitable contributions in 2021? 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 2021 and dates					Do you rent or own your home?	Rent Own	

## Estimated Tax Payments — Tax Year 2021

<i>Installment</i>	<i>Date paid</i>	<i>Federal</i>	<i>Date paid</i>	<i>State</i>
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2020 overpayment?		\$		\$
Total		\$		\$

## Advance Child Tax Credit Payments Received

<i>Payment date</i>	<i>Amount received</i>	<i>Payment date</i>	<i>Amount received</i>	<i>Payment date</i>	<i>Amount received</i>
July 15, 2021	\$	September 15, 2021	\$	November 15, 2021	\$
August 13, 2021	\$	October 15, 2021	\$	December 15, 2021	\$

## Tax Return Preparation

- Completion of the Tax Organizer is required. You have *completed all information* on this Tax Organizer completely and accurately. Any information not complete or accurate could *delay* the completion of your Income Tax Return. You have reviewed the Tax Checklist for required documents that need to be provided and ensure that you have provided all your required tax documents. We will begin completion of your tax return upon receiving all documents.
- We will prepare your 2021 Form 1040, U.S. Individual Income Tax Return, state tax return based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported. In addition, any tax response or resolution may require an additional service or fee.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities. Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2021 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years. You may be assessed a fee if you request a copy in the future.

## Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

**Signatures.** By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

<i>Taxpayer</i>	<i>Spouse</i>	<i>Date</i>
-----------------	---------------	-------------

## Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except if required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.