



Tax Organizer

Client(s) Name: _____

Phone/Cell No.: _____ Can we text you? Yes or No

E-mail address: _____

Did you move or did your address change during the year?

- Yes – New address: _____ Date moved: _____
- No

Do you have any changes from last year? (Married/divorce, new dependent, dependent that graduated/college, withdrawal money from retirement, lottery winnings, sold stock, etc.?)

Did you receive the **first stimulus** (Economic Impact Payment) from the IRS?

- Yes If yes, how much did you receive: _____
- No

Did you receive the **second stimulus** (Economic Impact Payment) from the IRS?

- Yes If yes, how much did you receive: _____
- No

Did you receive any unemployment compensation?

- Yes Did you receive Form 1099-G _____
- No (You may need to download - most likely will NOT be mailed)

Did you work from home instead of your office (in a city/municipality)?

- Yes – When did you start working from home: _____
When did you go back to your office: _____
- No

Did you make any cash contributions to 501(c) 3 charities and/or church? You can deduct up to \$300.00 per individual and \$600.00 for married filing jointly filers. (Does NOT include material donations to Goodwill/Salvation Army)

- Yes If yes, how much did you contribute? _____
- No

If you receive a **REFUND**, do you want the money directly deposited into your bank account?
(Provide a copy of your check or complete the following banking info – NO DEBIT CARD INFO)

- Yes – Same account as last year
- Yes - Routing # _____
Account # _____
Bank Name: _____
Is this a checking account or a savings account? _____
- No

If you **OWE** taxes, would you like to have the payment paid electronically?

- Yes E-file date or Deferred Date: _____
- No

Did you make any estimated payments?

- Yes Federal - How much?: _____
State – How much? _____
City/Rita – How much? _____
- No

Did you, your spouse, or any of your dependents have health insurance coverage thru the Affordable Care Act (ACA aka Marketplace aka Obamacare)?

- Yes---Upload or drop off form 1095-A
- No

Did you purchase anything out of state or over the internet for which sales tax should have been paid but was not?

- Yes—amount \$ _____
- No

At anytime during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (bitcoin etc.)?

- Yes—amount \$ _____
- No

Do you have any questions and/or situations that need to be addressed?
