

2020 Tax Organizer Personal and Dependent Information

Personal Information

	Name	SSN	Has IP PIN	Date of birth
Taxpayer				
Spouse				
Street address, city, state, and ZIP				
	Occupation	Daytime phone	Evening phone	Cell phone
Taxpayer				
Spouse				
Taxpayer email				
Spouse email				

Marital Status at end of 2020

- Married
 Married filing separately
 Single
 Widow(er) If spouse died in 2020
enter the date of death _____

Other information

- Are you blind? Yes No
 Are you disabled? Yes No
 Are you a full-time student? Yes No
 Do you want \$3 to go to the
Presidential Election Campaign Fund? Yes No

Taxpayer

- Yes No
 Yes No
 Yes No
 Yes No

Spouse

- Yes No
 Yes No
 Yes No
 Yes No

At any time during 2020 did you receive, sell, send, exchange, or acquire any financial interest in any virtual currency? Yes No

Dependent Information

First and last name SSN	Has IP PIN	Relationship	Months in home	Date of birth	Disabled	Full- time student	Childcare Expenses

List dependents required to file a return _____

COVID-19 Implications

Yes No

- Did you receive an Economic Impact Payment (EIP)?
 If "Yes," provide Notice 1444 from the IRS.
 Did you experience economic loss due to COVID-19 (loss of job, closed business, etc.)?
 Were you unemployed for any portion of the year due to COVID-19?
 Did you continue to receive wages from your employer even if you were unable to work?
 Did you receive a distribution from a retirement plan (401K, IRA, etc.) due to COVID-19?

If you own a farm or business:

- Did you continue to pay any employee while they were not working?
 Did you delay withholding FICA taxes from any employee's pay?
 Did you receive a Paycheck Protection Program (PPP) loan?
 If "Yes," was the loan forgiven or have you applied for forgiveness? _____
 Were you unable to work due to COVID-19 and, if employed by someone other than yourself,
 would have qualified for sick or family leave?

Appointment Information

Your 2020 appointment is scheduled for _____

Checklist

Name: _____

SSN: _____

Checklist

This check list is provided to help you gather necessary information for us to prepare your 2020 income tax return. Return this list, along with the supporting documentation, to our office and let us know of any significant changes from your 2019 tax year.

Copies of Identification Documents

- Driver's License - for all taxpayers and spouses
- Birth Certificate - for new clients or new dependents
- Social Security Card - for new clients or new dependents

Communication Preferences

- Call with questions
- Email with questions
- Call with results
- Email with results
- Zoom webconference with results
- Receive a hard copy of the return (no electronic copy sent)
- Receive an electronic copy of the return (no hard copy sent)

State and city refunds and other government payments (Form 1099-G)

- Unemployment compensation

Other Income (provide supporting documentation for income received for the following items)

- Amount of Economic Impact Payment (Stimulus) _____
- Sale of assets or property
- Cancellation of debt
- Other income _____

Payments (provide supporting documentation for payments made for the following items)

- Educator classroom expenses
- Contributions to a Health Savings Account
- Expenses related to work relocation (military only)
- Alimony (for divorces finalized before 2019)
- Student loan interest
- Tuition and fees for higher education
- Expenses related to child or dependent care
- Contributions to a Retirement Savings Account
- Medical and dental expenses
- Real estate taxes
- Other state and local taxes
- Mortgage interest
- Investment interest
- Cash Contributions - \$300 deduction available for cash donations, even if you do not itemize for 2020
- Noncash Contributions
- Investment expenses
- Gambling losses
- Other payments _____