

## 2020 INCOME TAX DATA ORGANIZER

[www.bensontaxservice.com](http://www.bensontaxservice.com)

Name:	B'date:	SS#:	Occupation:
Spouse's name:	B'date:	SS#:	Occupation:
Phone, home:	T/P cell:	Spouse cell:	
Address:	City:	State:	Zip:
Best E-mail address to use:			
Did you have Health Insurance in 2020?	Was it Marketplace coverage?	Deal in Cryptocurrency?	
Did your Spouse have Health Insur. in 2020?	Was it Marketplace coverage?	Deal in Cryptocurrency?	

DEPENDENTS - Please bring some documentation that each dependent lives with you.						
Name	SS# (unless on file)	B'date	Relationship	Months with you?	Covered by Health Insurance?	Daycare Cost*
1						
2						
3						
4						
5						

\* Day care providers name & i.d. # \_\_\_\_\_

\*\* Must Bring Transcripts of Tuition Bill Payments and Form 1098-T for all in College

INCOME DOCUMENTS TO BRING	
___ 1095s	Health insurance statements
___ W-2s	Earnings as Employee
___ 1099NEC	Non-Employee Comp.
___ 1099MISC	Miscellaneous Earnings
___ 1099R	Pensions, Annuities, IRAs etc
___ 1099INT & 1099DIV	Interest & Dividends Earned
___ 1099A or 1099C	Debt Forgiveness
___ 1099S	Sale of Property
___ 1099B	Sale of Stocks, Mutual Funds
___ Other 1099	Any form with '1099' on it
___ Schedule K-1s	Partnerships, Trusts, Estates
___ Social Security	SS Benefits

OTHER INCOME	
	Amount if Available
___ Alimony	
___ Hobby income	
___ Gig Income	
___ Jury duty	
___ Prizes	
___ Royalties	
___ Scholarships	
___ Tips	
___ Unemployment comp.	
___ Other _____	
___ Gambling Winnings***	
<b>*** Bring win-loss statements and gambling diary</b>	

OTHER REMINDERS TO BRING
___ Most recent paystubs, printed.
___ 529 Contributions
___ Self employment income & expenses (use Business Organizer from website)
___ All investment year-end statements & anything that says "Important tax information"
___ List of all undocumented or 'side' income.
___ Have bank accounts overseas? __Yes __No
___ Have assets/businesses overseas? __Yes __No
___ Made out-of-state purchases for which you owe state sales tax? Bring list.

RENTAL INCOME & EXPENSES		
Is this an LLC? _____	Joint ownership? _____	
	Rental #1	Rental #2
Rent Received		
# of days rented out		
# of days used personally		
Advertising		
Cleaning & Maintenance		
Insurance		
Management Fees		
Mortgage Interest		
Other Interest		
Repairs		
Supplies		
Taxes		
Utilities		
Major Purchase		
Name & date _____		
Name & date _____		
Other _____		
Other _____		
# of Miles Driven		

DID YOU SEND IN ESTIMATED TAXES FOR 2020?
If yes, bring record of amounts & dates paid, & any new vouchers for 2021 estimated payments.

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*Continued*

VARIOUS EXPENSES & CONTRIBUTIONS	
	Amount
Alimony Paid to : _____ <small>(unless divorce was finalized after 2018)</small>	\$
<b>IRA (Traditional) Contribution for 2020</b> Taxpayer ..... Spouse .....	
<b>IRA (Roth) Contribution for 2020</b> Taxpayer ..... Spouse .....	
<b>IRA Conversions ?</b> Yes _____ No _____	
<b>SEP Contributions for 2020</b> Taxpayer ..... Spouse .....	
<b>HSA (Health Sav. Account) Contributions</b> <i>(not contributed through employer)</i> Taxpayer ..... Spouse .....	

* CHARITABLE CONTRIBUTIONS	
	Amount
Money Donations by Check/Credit Card Must <u>also</u> have receipt if over \$250 Please bring all receipts <i>NOTE: If you do not itemize, you may still deduct up to \$300 of a money donation to charity</i>	\$
Property (Clothing, etc) Donations Please all bring receipts (Goodwill & S/A and such receipts must show list of items donated)	
# of Miles Driven for Charity	

MISCELLANEOUS EXPENSES	
	Amount
Teachers: Classroom Expenses, Taxpayer	
Teachers: Classroom Expenses, Spouse <small>(Teacher expenses up to \$250 are deductible and now include PPE and professional dues)</small>	
Gambling Losses (up to Winnings)	

* MEDICAL EXPENSES (If substantial, above 7.5% of income)	
Insurance Premiums - Only if Taxed	
Medicare Premiums	
Long Term Care Premiums	
Prescriptions	
Eyeglasses, Contacts	
Doctors, Dentists	
Hospital, Clinics	
Medical Supplies	
Other Medical Expenses	
Other Medical Expenses	
# of Miles driven for Medical Purposes	
Reimbursements received	

* TAXES - bring documentation	
	Amount
Real Estate Tax	
Second House Tax	
Autos _____ + _____ + _____	
Sales Tax on Large Purchases, Autos	

* INTEREST PAID - bring 1098 interest documentation	
Home Mortgage Interest	
Second Home Mortgage Interest	
Home Equity Interest	
Student Loan Interest	

In 2020, did you:	
Take Education Courses? <small>(Please bring all 1098Ts)</small>	_____
Exercise Stock Options?	_____
Made Energy Improvements?	_____
Give gifts of over \$15,000?	_____
Refinance? Bring settlement papers	_____
Had credit card/loan forgiveness? bring 1099A and/or 1099C	_____

FOR YOUR OWN WELFARE	
Do you have a Current Will?	
Have you designated every beneficiary?	

**\* NOTE: In order to benefit from these expenses, their total (Medical over 7.5%, Mortgage Interest, Charitable, & Property/State Taxes up to \$10,000) will have to exceed your standard deduction.**  
 Standard deduction for Singles is \$12,400  
 Standard deduction for Head of Household is \$18,650  
 Standard deduction for Married Filing Joint is \$24,800, over 65 yrs old \$27,400  
 Bring all such information just in case you have enough to itemize.