

2021 INCOME TAX DATA ORGANIZER

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| | | | |
|-----------------------------|-----------|--------------|-------------|
| 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: | | | |

| | |
|--|-------------------------------|
| Amounts of Stimulus #3 received (was max \$1400/person): | Bring Letter 6475 &/or 1444-C |
| Amounts of Advanced Child Tax Credit received: | Bring Letter 6419 |
| Did anyone have Marketplace Health Insurance in 2021? | If yes, bring Form 1095A |
| Do you deal in Virtual Currency? | |

DEPENDENTS - Please bring some documentation that proves 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 | | | | | | |

* Day care providers name & i.d. # _____

| INCOME DOCUMENTS TO BRING | |
|------------------------------|-------------------------------|
| ___ All IRS Notices Received | |
| ___ 1095A | Marketplace Health Insur. |
| ___ 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 e.g. Uber, Airbn | |
| ___ Jury duty | |
| ___ Prizes | |
| ___ Royalties | |
| ___ Scholarships | |
| ___ Tips | |
| ___ Unemployment comp. | |
| ___ Other _____ | |
| ___ Gambling Winnings*** | |
| *** Bring win-loss statements and gambling diary | |

| 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 | | |

| FOR YOUR COLLEGE STUDENTS |
|--|
| ___ Form 1098T from the university, trade school, etc |
| ___ Transcript of all tuition bills for 2021 |
| ___ List of books, computer, supplies needed for studies, with receipts |

| DID YOU SEND IN ESTIMATED TAXES FOR 2021? |
|--|
| If yes, bring record of amounts & dates paid, & any new vouchers for 2022 estimated payments. |

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Continued

| VARIOUS EXPENSES & CONTRIBUTIONS | |
|--|--------|
| | Amount |
| Alimony Paid to : _____ (unless divorce was finalized after 2018) | \$ |
| IRA (Traditional) Contribution for 2021? Taxpayer Spouse | |
| IRA (Roth) Contribution for 2021? Taxpayer Spouse | |
| IRA Conversions ? Yes _____ No _____ | |
| SEP Contributions for 2021? Taxpayer Spouse | |
| HSA (Health Sav. Acct) Contributions? <i>(not contributed through employer)</i> Taxpayer Spouse Bring both 5498-SA and 1099-SA Forms | |
| Student Loan Interest Reported on 1098Es Must be personally liable for the loan | |

| * CHARITABLE CONTRIBUTIONS | |
|---|--------|
| | Amount |
| Money Donations by Check/Credit Card Must <u>also</u> have receipt if over \$250 Please bring all receipts <i>NOTE: Everyone can deduct \$300 (\$600 married) if donations are in money and you have proof. No itemization necessary</i> | \$ |
| Property (Clothing, etc) Donations Please 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 (Teacher expenses up to \$250 are deductible including PPE and dues) | |
| 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, if for improvements | |

| In 2021, did you: | |
|--|-------|
| Take Education Courses? (Please bring all 1098Ts) | _____ |
| Exercise Stock Options? | _____ |
| Made Energy Improvements? (Bring receipts and how they qualify) | _____ |
| Give gifts valued \$15,000 or over? | _____ |
| 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: To benefit from Medical, Interest, Taxes and Charity by itemizing (using Schedule A), their total** will have to exceed your standard deduction.**
 (**total of Medical over 7.5%, Mortgage Interest, Charitable, & Property/State Taxes up to \$10,000)
 Standard deduction for Singles is \$12,550
 Standard deduction for Head of Household is \$18,800
 Standard deduction for Married Filing Joint is \$25,100, over 65 yrs old \$27,800
 Bring all such information just in case you have enough to itemize.