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Tax Organizer Tax Year 2021

(If you are a new client, please send a copy of last year tax return.)

Taxpayer Nam Spouse Name			SS No. SS No.			Birth date/ Birth date/		n#_/ / / / / / / n#_/ / / / / / /
Address:	Phone: ()		Telepho	one (Home) one (Work) one: ( )	()			
Email Addres Circle One:	s:		Married Filing Joint (enter spouse's nam			ving Widow	/Widower of Household	
Circle One:	Taxpayer:	65 or over Under 65	Blind/Disabled	Spouse:	65 or over Under 65	Blind/Dis		
Dependente	Di	rth data		umbor*	Deletie	nahin	No. of Mont	ha

<b>Dependents</b> Name	Birth date	S	ocia	l Se	curity	/ Nu	mbe	er*		Relationship	No. of Months lived in your home in 2021

## College Student:

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Members of your family attending college may make you eligible for a Hope Scholarship Credit Deduction. # Students Please provides the 1099T on each student and college expenses other than Room and Board.

Please provide me with the following documents. You <u>do not have to list</u> the numbers from these documents on the Tax Organizer. I will take the numbers directly from the source document.
1) Did you receive a stimulus check March 2021? Yes <u>NO</u> The IRS will send Letter 6475 than contains the total amount of the third Economic Impact Payment. (Enclose Letter 6475)
<ol> <li>Did you receive any child tax credits from July 2021 thru December 2021? Yes \$ No The IRS will send Letter 6475 with the total amount of advanced Child Tax Credit. (Enclose Letter 6419)</li> </ol>
3) All IRS and/or LDR tax notices and/or correspondence you received during the year. (Bring the Notice)
4) Did you have any children under the age of 19 with unearned income of more then \$1,100? (Need details)
5) Did you purchase a new alternative technology vehicle or electric vehicle? (Need details)
6) Did you install any energy property to your residence such as solar water heaters, generators or fuel cells or energy efficient improvements such as exterior doors or windows, insulation, hear pumps, furnaces, central air conditioners or water heaters? (Need details and certificate)
7) Do you have Health Insurance with the Marketplace/Exchange? Yes No
Yes= Forms 1095A 1095B 1095C

### **Estimated Tax Payments**

		Quarter- R 2021		2 <sup>nd</sup> Quarter- JUN 2021		3 <sup>rd</sup> Quarter- SEP 2021		4 <sup>th</sup> Quarter- JAN 2022						
	Date Paid	Amour	nt	Date Paid	Amour	nt	Date Paid	Amou	int	Date Paid	Amour	nt	TOTAL	
Federal														
State														

Wage Income.....(Enclose all W-2 Forms)

Retirement Benefits Received....... (Enclose all 1099-DIV Forms) Social Security .....(Enclose all SSA-1099) Rail Road Retirement.....(Enclose all 1099 & RRB) S Corporation or Partnership Income....... (Enclose K-1) Estate or Trust Income...... (Enclose K-1) Capital Assets Sold (Securities, Real Estate, etc.) (Attach Forms 1099B and 1099S) Business Assets Sold ......(Attach Forms 1099B and 1099S) Business Assets Traded...(Example: vehicle)...(Need Details) Gaming, Casino, Other.....(Attach W2G) Installment Sale Payments Received and Self Financed Mortgages: Interest \$\_\_\_\_\_ Principal \$\_\_\_\_\_ Buyer's name: \_\_\_\_\_ SS # \_\_\_\_\_ Address: \_\_ Do you have funds in a foreign account, trust, or business? Yes No

(Outside of the USA other than securities) <u>Yes=(IMPORTANT!!!)Need details.</u>

# Did you buy, sell, or transfer any virtual currency? ? Yes No

(That includes the purchase of anything with virtual currency).

Yes=(IMPORTANT!!!)Need details

## Child Care Deductions (Number of Dependents Qualifying: )

SS No. or Federal ID	Amount	
	SS No. or Federal ID	SS No. or Federal ID Amount

Did you receive employer-provided dependent care assistance benefits? Yes No Amount: \$

## Rental Income (Attach 1099 Forms)

	One	Two	Three	Four	Five	Six	Seven	Eight
Property Description								
Gross Income								
Expenses								
Advertising								
Auto & Travel								
Cleaning & Maintenance								
Commissions								
Insurance								
Professional Fees								
Mortgage Interest								
Other Interest								
Repairs								
Supplies								
Taxes								
Utilities								
Wages/Schedule								

## Depreciable Asset ......(Additions New and Used)

For Schedule C, E, F	Description	Date Purchased	Cost	Trade-In (if any)

(On the purchase of new property, the land must be listed separately from the other assets purchased)

## **Business Use of Home**

Total Area of Home:	sq. ft.	Total area Used for Business:	sq. ft.

Nature of Business Activity Performed in Home:

Was Another Office Available to You Outside the Home? Yes No (Yes=need details)

## Business Income (Attach 1099-MISC Forms)

Business Name

Federal ID No.

Principal Business Activity \_\_\_\_\_

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Method Used to Value Inventory

Gross Incomo		Amoun
Accounting Method:	Cash	Accrual

Gross	income	

Amount

\_\_\_\_\_

Gross Income	
Cost of Sales	
Beginning Inventory	
Purchases	
Cost of Labor	
Materials and Supplies	
Freight In	
Other	
Ending Inventory	

#### Deductions

Advertising		
Bad Debts.	Advertising	
Collection Expense.	Auto-Truck Expense	 
Commissions	Bad Debts	
Commissions	Collection Expense	
Employee Benefit Program         Freight & Express         Utilities         Insurance         Interest—Mortgage         Interest—Other         Janitorial & Cleaning         Laundry         Legal & Accounting Fees         Office Expense         Postage         Rent		
Freight & Express	Professional Dues & Subscriptions	
Freight & Express	Employee Benefit Program	
Utilities		
Insurance.	Utilities	
Interest—Other		
Interest—Other	Interest—Mortgage	
Janitorial & Cleaning	Interest—Other	
Laundry		
Office Expense.		
Office Expense.	Legal & Accounting Fees	
Postage    Rent    Repairs    Salaries    Supplies    Telephone    Travel		
Rent    Repairs    Salaries    Supplies    Telephone    Travel		
Repairs		
Salaries      Supplies      Telephone      Travel		
Supplies		
Telephone		
Travel		

## Farm Income (Attach 1099 Forms)

Farm Name

Principal Activity\_\_\_\_

Accounting Method: Cash Accrual

#### Income

Sales of Items Bought for Resale...... Cost of Items Bought for Resale......

#### Sales of Livestock & Produce Raised Except for Breeding Stock

Feeders & Calves
Pigs & Sheep
Poultry & Eggs
Dairy Products
Corn, Peas, etc.
Wheat, Oats, Hay & Straw
Fruit
Patronage Dividends
Agricultural Program Payments
Commodity Credit Loans Neglected
CCC Loans: Forfeited
Repaid with Certificates
Crop Insurance Proceeds
Federal Gasoline Tax Credit
Other

## Deductions

Breeding Fees	
Chemicals	
Conservation Expenses	
Custom Hire (Machine Work)	
Employee Benefits Programs	
Feed Purchased	
Fertilizers & Lime	
Freight & Trucking	
Gasoline, Fuel, Oil	
Insurance	
Interest—Mortgage	
Interest—Other	
Labor Hired	
Pension & Profit Sharing Plans	
Rent of Farm, Pasture	
Repairs, Maintenance	
Seeds, Plants Purchased	
Storage, Warehousing	
Supplies Purchased	
Taxes	
Utilities	
Veterinary Fees, Medicine	

## Household Employee Information

EIN:Household Employer\_

Did you pay any one household employee \$2,300 or more in 2021? Yes No

Do you have a Form I-9/ and W-4 on file for your household employee? Yes NO

Employee Name\_\_\_\_\_SS Number \_\_\_\_\_

Gross Wages	FITW	SS Withheld	Employer Share FICA	Advance EIC	FUTA	

## **Itemized Deductions**

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<u>*Itemized Deductions M</u> Standard Deductions to	
Standard Deduction is	:
<b>Married Filing Joint</b>	\$25,100
Single	\$12,550
Head of Household	\$18.800
* ^^^^(Note	)^^^^^

Amount

Medical	Amount	
Prescription Drugs		
Medical Insurance Premiums		
Long Term Care Ins. Premiums		
Medicare Premiums		
Doctors/Dentists		
Clinic/Lab Tests		
Hospitals		
Eyeglasses/Hearing Aids		
Orthopedic Shoes/Braces		
Medical Long Distance Phone		
Other		
Miles		
Fares: Taxi, Bus, etc		
Do you have a medical savings acct.?		
Interest		
Deductible Home Mortgage Interest Pa	aid to	
Financial Institutions		
Home Equity Interest		
Deductible Home Mortgage Interest Pa		
Individuals:*		
Name Address:*		
Social Security No.:*		—
*		-
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Did you withhold Federal income tax during 2021 at the request of any household employee? Yes No

Did you pay total cash wages of \$1,000 in any calendar quarter of 2021 to household employees? Yes No

Was the employee under age 19? Yes No Student? Yes No

Taxes

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TUNCS	
Real Estate	
Personal Property	
State & Local Income Tax	
State & Local General Sales Tax	

#### Charitable Contributions

Cash Contributions*		
Other Than Cash Contributi	ons	
Miles for Charity		substantiation

\*Contributions of \$250 or more require written substantiation from the organizations.

#### Miscellaneous Deductions Not Subject to 2% AGI

Gambling Losses (limited to winnings)..

# Employment Related Expenses that you paid

An Armed Forces reservist, a qualified performing artist, a feebasis state or local government official, or an individual with a disability claiming impairment-related work expenses.

Mileage	
Expenses	(need details)
Meals out of town	

See our Web Page..... etaxla.com

## **Retirement Contributions for 2021**

	Taxpayer	Spouse
IRA or Roth, Specify		
SEP		
Keogh		
Other:		

## Sale of Personal Residence (Attach copy of closing/settlement statement)

(In most cases this is not taxable unless it was rented but must be reported)

Date Old Residence Acquired	Cost or Basis of Old Residence	
Cost of Improvements (landscaping, driveway, roc	of, etc.)	
Fixing Up Expenses (painting, repairs, etc.,) to Pre	epare for Sale	
Date Old Residence Sold	Selling Price	
Expenses of Sale (commissions, legal fees, points	s, deed stamps, etc.)	
Was any part of residence rented or used for busin	ness?	
Was it your principal place of residence for 2 of the	e last 5 years, ending on date of sale?	
Date New Residence Acquired (or construction be	egan)	
Date you occupied new residence	Cost of New Residence	
If married do you and/or your spouse meet the ow	nership and residence requirements?	

## Did you have Hobby income? Type of Hobby \_\_\_\_\_

Amount received\$\_\_\_\_\_ Amount Expenses \$\_\_\_\_\_(Need Details)

# Did you have any other Income from other sources?

Source Amount\$

Source\_\_\_\_\_Amount:\$\_\_\_\_\_

\_To the best of my knowledge the enclosed information is correct and includes all income deductions and other information necessary for the preparation of this year's income tax returns for which I have adequate contemporaneous records.

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Signature	Date		