



James F Rogers CPA PA

Certified Public Accountant

800 E 1st Street Suite 225
Wichita KS 67202-2787

Phone: 316 262-2795

Fax: 316 633-4033

Text: 316 371-6950

Web site: <http://www.jamesrogerscpa.com>

Email: jayna@jamesrogerscpa.com

cathy@jamesrogerscpa.com

jim@jamesrogerscpa.com

Yes, It is that time of year again !!!

Another interesting year! The pandemic is still with us but there is some good news. Tax laws have not changed that much this year. We still are dealing with challenging times and our hope is to help you achieve your financial goals. Please know that we appreciate your patronage.

Some challenges we have this year are related to the final Economic Stimulus Payment and the Advance Child Tax Credit payments. Letters are being generated by the IRS to provide details but we must realize that the IRS is understaffed and dealing with antiquated computer systems and technology. We are seeing some improvement but there is still a long way to go. Also, keep track of those itemized deductions. It is now easier to itemize for Kansas.

Because of Covid-19 we ask that face to face contact, again be limited as much as possible. We suggest that there are 3 ways to exchange information with us:

- 1) In person at our office (Masks and social distancing is required)
- 2) By regular mail (USPS) We handled much of our tax preparation work by mail last year, and while not the most convenient, it worked pretty well.
- 3) By email from our website file transfer system. (More info on our web site)

Please remember we have Convenient Parking for our clients on the north side of our building, the "Old Town Center" in Wichita's Historic "Old Town". Our office is on the 2nd floor, northeast corner of First (one way east) and Mead, just east of the main downtown railroad tracks. The entrance to our building is on Mead street.

Our scheduled tax season office hours will be:

Monday through Friday	9:00 to 5:00 (Closed for lunch 12:00 to 1:00)
Saturday	10:00 to 3:00

If these hours are not convenient, call or text and we can make other arrangements. At certain times the outside entrance to the building is locked, just call and we'll let you in.

Please contact us by April 1st if possible. The ***due date*** is ***Thursday April 18.*** We are enclosing our worksheet for you to use as you see fit. It works pretty well for a lot of people, even if not perfect for everybody. Just fill it in or use it as a guide.

Jayna, Cathy and I look forward to seeing you soon,

**JAMES F ROGERS CPA PA
CLIENT WORKSHEET**

2021

TAXPAYER

SPOUSE

Name	_____	_____
Soc Sec #	_____	_____
Occupation	_____	_____
Birth Date	_____	_____
Best Phone #	_____	_____
E Mail Address	_____	_____
Street Address	_____	Note: Names and SSN's must match Social Security Admin records
City, St, Zip	_____	

Dependents:	Full Name	Birth Date	Soc Sec #
1	_____	_____	_____
2	_____	_____	_____
3	_____	_____	_____
4	_____	_____	_____

Estimated Tax Payments:		----- FEDERAL -----	----- KANSAS -----			
	Payment #	Date Due	Date Paid	Amount	Date Paid	Amount
	Overpayment from 2020			_____		_____
	1	4/15/21	_____	_____	_____	_____
	2	6/15/21	_____	_____	_____	_____
	3	9/15/21	_____	_____	_____	_____
	4	1/17/22	_____	_____	_____	_____

Income:	(Please enclose 1099's & W-2's)	<u>Taxpayer</u>	<u>Spouse</u>
	Wages	_____	_____
	Pensions	_____	_____
	IRA Distributions	_____	_____
	State Tax Refunds	_____	_____
	Alimony Received	_____	_____
	Unemployment Compensation	_____	_____
	Social Security Benefits	_____	_____
	Other? _____	_____	_____

Adjustments to Income:	<u>Taxpayer</u>	Date	<u>Spouse</u>	Date
Alimony Paid: SSN _____	_____		_____	
Penalty, Early W/D Savings	_____		_____	
Student Loan Interest	_____		_____	
Teacher Classroom Exps	_____		_____	
Keogh, SEP or Simple	_____	_____	_____	_____
Roth IRA	_____	_____	_____	_____
Traditional (Regular) IRA	_____	_____	_____	_____
Other? _____	_____		_____	
_____	_____		_____	

** **3rd Economic Stimulus Payment Received** _____ **IRS Letter # 6475**

Advance Child Tax Credit Pmts Received _____ **IRS Letter # 6419**

----- **Interest Received** -----

From:	(Please enclose 1099's)	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

----- **Dividends Received** -----

From:	(Please enclose 1099's)	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Sale of Stocks, Securities and Other Investments: (Please enclose 1099's)

Description	Date Acq	Date Sold	Sale Price	Cost Basis	Gain(Loss)
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Itemized Deductions:

Medical Expenses

Medical Insurance	_____
Long Term Care Insurance	_____
Prescription Drugs & Medicine	_____
Eyeglasses	_____
Doctors, Dentists	_____
Hospitals & Labs	_____
Other? _____	_____
Insur. Reimbursements Recd?	_____
Medical Miles	_____

Interest Paid (Please enclose 1098's)

Home Mortgage: First	_____
Home Mortgage: Second	_____
Investment Interest	_____
Other? _____	_____

Charitable Contributions

Churches	_____
Charitable Organizations	_____
Other? _____	_____
Non-Cash? _____	_____
Volunteer Miles Driven	_____

Taxes Paid

Real Estate	_____
Personal Property (Autos etc)	_____
2019 State Tax Paid in 2020	_____
Other? _____	_____
Sales Taxes (Major Purchases)	_____

**** Please Note: Charity Amounts up to \$300 / \$600 jt are allowed this year even if you cannot itemize.**

**** Reminder: Many taxpayers may not itemize anymore due to increased standard deductions.**

**** Furthermore: It is now possible to itemize for Kansas even if you cannot on the Federal.**

Tax Credits:

Child & Dependent Care

Child	Paid to	Address	ID Number	Amount
Child 1 _____	_____	_____	_____	_____
Child 2 _____	_____	_____	_____	_____
Child 3 _____	_____	_____	_____	_____

Education Credits (please enclose 1098-T's)

Student Name	Exps Paid	Status During the year (ie. Fresh. Soph. etc)
_____	_____	_____
_____	_____	_____