

## Organizer Options

### 1 Appointment Information

Date:

Day:

Time:

### 2 Miscellaneous

Check ("X") to SUPPRESS Social Security Numbers throughout this organizer.

### 3 Printing

**Check ("X") to include  
in printed Organizer**

- Pg 1 - Basic Info, Dependents, Wages, and Pensions
  - Pg 2 - General Questions
  - Pg 3 - Interest, Dividends, and K-1
  - Pg 4 - Stocks, Other income, and Adjustments to income
  - Pg 5 - Itemized deductions and Education Expenses
  - Pg 6 - Estimates
  - Pg 7 - Vehicle and Business use of home
  - Pg 8 - Comments
  - Custom
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HETZEL ACCOUNTING INC  
TARA L STILL  
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**Organizer Mailing Slip**

# TAX ORGANIZER

## Basic Taxpayer Information

	First Name	Initial	Last Name	Suffix	Social Security No.
Taxpayer					
Spouse					

	Occupation	Date of Birth	Check if			
			Disabled	Blind	Dependent of Another	Presidential Election Contrib.
Taxpayer						
Spouse						

Street & Apt/Suite	City, State & Zip	Foreign country	Foreign province	Foreign postal code	Phone Res:
					Phone Work:
					Cell Phone:
					E-mail:
		School District			

	State Issue ID Number	Driver's License Number	Issuing State	Issue Date	Expiration Date
Taxpayer					
Spouse					

Filing Status  1 - Single; 2 - Married filing joint; 3 - Married filing separate; 4 - Head of Household; 5 - Qualifying Widower

### Dependent Information

	First Name	Last Name	Social Sec. No.	Relationship	Months in home	Date of Birth	Disabled or full time student
1							
2							
3							
4							
5							
6							

### Wages and Salaries

	Employer Name	Wages	Federal Tax Withheld	FICA Withheld	Medicare Withheld	State Tax Withheld	Local Tax Withheld
1							
2							
3							
4							
5							
6							

### Pensions and IRAs

	Payer's Name	Gross Distribution	Taxable Distribution	Federal Tax Withheld	IRA
1					
2					
3					
4					

### Attestation and Signature:

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 records.

Sign \_\_\_\_\_ Date \_\_\_\_\_  
 here \_\_\_\_\_ Date \_\_\_\_\_

## General Questions

Please check if "Yes" and provide documentation, if possible.

- |  |   |
|--|---|
|  | 1. Has your marital status changed?   |
|  | 2. Were you in a Registered Domestic Partnership, civil union or same-sex marriage during 2021?   |
|  | 3. Have you been notified by the IRS of changes to a prior year's return, or received any other tax correspondence?   |
|  | 4. Are you being claimed as a dependent by another person?  |
|  | 5. Are there any changes in the dependent information from the prior year?  |
|  | 6. Did you have any children under 19 (or 24 if a full time student) who received more than \$1,100 in investment income?   |
|  | 7. Do you have dependents who are neither U.S. citizens nor U.S. residents?   |
|  | 8. Did you provide over half of the support for another person (or persons) during the year?  |
|  | 9. Did you purchase or sell a principal residence?  |
|  | 10. Did you receive payments from a pension or profit sharing plan?   |
|  | 11. Did you receive any distributions from an IRA or other qualified plan?  |
|  | 12. Did you receive any disability income?  |
|  | 13. Did you receive any foreign income or pay any foreign taxes?  |
|  | 14. Did you receive interest from a bank account or other financial account based in a foreign country?   |
|  | 15. Were you the grantor of or transferor to a foreign trust?   |
|  | 16. Were either you or your spouse enlisted in the military or National Guard?  |
|  | 17. If you or your spouse are self-employed, are either of you covered under an employer's health plan at another job?  |
|  | 18. Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2021?   |
|  | 19. Did you claim a First-time Homebuyer Credit for a home purchased in 2008?   |
|  | 20. Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit?   |
|  | 21. Did you receive proceeds from an installment sale?  |
|  | 22. Did you make a loan at an interest rate below market rate?  |
|  | 23. Did you make gifts of more than \$15,000 to any one person?   |
|  | 24. Were there any changes to a prior year's income, deductions, or credits?  |
|  | 25. Did your employer pay premiums on life insurance in excess of \$50,000?   |
|  | 26. Were any payments made on student loans?  |
|  | 27. Did you pay any educational tuition or fees for you or a dependent?   |
|  | 28. Did you purchase a 'clean fuel' or electric hybrid vehicle in 2021?   |
|  | 29. Did you refinance a mortgage or take out a home equity loan?  |
|  | 30. Were any contributions made to a traditional or Roth IRA for 2021?  |
|  | 31. Did you make any contributions to HSA (Health Savings Account) in 2021?   |
|  | 32. Did you receive an early distribution for a Coronavirus (CARES Act) qualified distribution?   |
|  | 33. Did you receive an early distribution for a qualified birth or adoption distribution?   |
|  | 34. Did you or a member of your family have minimum essential coverage in 2021? (The entity that provided the coverage may have sent you a Form 1095-A, 1095-B, or 1095-C, that lists individuals in your family who were enrolled in minimum essential coverage and shows their months of coverage.) |
|  | 35. Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?   |

## Business and Investment Questions

- |  |  |
|--|--|
|  | 1. Did you receive stock from a stock bonus plan with your employer?   |
|  | 2. Did you buy or sell any bonds?  |
|  | 3. Did you surrender any U.S. savings bonds?   |
|  | 4. Did you suffer a casualty, theft or condemnation?   |
|  | 5. Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S-corporations? |
|  | 6. Did you own any investments for which you were not personally at-risk?  |
|  | 7. Did you own any interest in a Real Estate Mortgage Investment Conduit (REMIC)?  |
|  | 8. Did you sell any property or equipment on installments?   |
|  | 9. Did you incur any business-related educational expenses?  |
|  | 10. Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?          |
|  | 11. Did you purchase any special fuels for non-highway use?  |
|  | 12. Did you make any contributions to a Keogh or a self-employed SEP, SIMPLE or Qualified plan?                          |

### Interest Income

Please provide copies of all Form 1099-INT or other statements reporting interest income.

\* F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint.

*F/S/J	Payer
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Taxable Interest Income		Tax Exempt Interest		Specified Priv Act Interest	
Prior Year Amount	Current Year Amount	Prior Year Amount	Current Year Amount	Prior Year Amount	Current Year Amount

### Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

\* F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint.

*F/S/J	Payer
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Ordinary Dividends		Qualified Dividends		Capital Gains	
Prior Year Amount	Current Year Amount	Prior Year Amount	Current Year Amount	Prior Year Amount	Current Year Amount

### Income or Loss from Partnerships, S Corporations, and Trusts

	Name	Income	Loss	Other Expenses	Passive (Yes / No)	*P/S/T
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

\*P/S/T - enter entity type (P)artnership, (S) Corporation, (T)rust

**Gains or Losses from Sales of Stocks, Securities or Other Assets**

	Kind of Property and Description	Date acquired	Date sold	Sales Price	Cost or other basis
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

**Other Income**

		Prior Year Amount	Current Year Taxpayer	Current Year Spouse
1	Taxable refunds of state and local income taxes			
2	Alimony received			
3	Business income or (loss) - Schedule C			
4	Other gains or (losses) - Form 4797			
5	Rents and royalties - Schedule E pg 1			
6	Farm income or (loss) - Schedule F			
7	Unemployment compensation			
8	Total social security benefits			
9	Tips			
10	Child care taxable benefits			
11	Prizes and awards			
12	Scholarships and fellowships			
13	Other income not provided for in this organizer			
14				
15				
16				

**Adjustments to Income**

		Prior Year Amount	Current Year Taxpayer	Current Year Spouse
1	Educator expenses			
2	Business expenses of reservists, performing artists and fee-basis gov't officials			
3	Health savings account deduction			
4	Moving expenses for members of the armed forces			
5	Self-employed SEP, SIMPLE, and qualified plans			
6	Penalty on early withdrawal of savings			
7	Alimony paid			
8	Your IRA contribution			
9	Spouse's IRA contribution			
10	Student loan interest			
11	Tuition and fees			

### Itemized Deductions

		Prior Year Amount	Current Year Amount
1a	Medical and dental expenses (other than long-term care premiums)		
1b	Long-term care premiums                      Taxpayer                                      Spouse		
2	Other state and local taxes paid not reported elsewhere in this Organizer		
3	State and local income taxes paid		
4	Real estate taxes		
5	Personal property taxes		
6	Other taxes		
7	Home mortgage interest and points reported on Form 1098		
8	Home mortgage interest not reported on Form 1098 Name:                                      Address:                                      SSN:		
9	Home mortgage points not reported on Form 1098		
10	Qualified mortgage insurance premiums		
11	Investment interest paid		
12	Gifts to charity by cash or check		
13	Gifts to charity other than by cash or check		
14	Mileage driven to charitable activities		
15	Casualty and theft loss(es) from a federally declared disaster		
16	Unreimbursed employee expenses (State use only)		
	Travel expenses (exclude meals)		
	Meals		
	Parking and tolls (enter other vehicle information on Page 7)		
	Telephone used for employer's business (allocate cost)		
	Professional organization or union dues		
	Educational expenses required to maintain your job		
	Office in home required by employer		
	Tools and equipment		
	Uniform and protective clothing		
	Professional journals subscriptions		
	Job seeking costs		
	Other		
17	Tax preparation fees (State use only)		
18	Other expenses (State use only)		
	Investment expenses (State use only)		
	Safe deposit box rental (State use only)		
	Other (State use only)		
19	Other itemized deductions		

### Education Expenses

	Student's Name	Type of Expense	Year of School	Amount
1				
2				
3				
4				
5				
6				

### Child or Dependent Care Expenses

Persons or Organizations Who Provided the Care		Social Security or ID Number	Amount Paid
Name	Address		
1			
2			
3			
4			











**SCHEDULE C  
(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Profit or Loss From Business**

(Sole Proprietorship)

OMB No. 1545-0074

**2020**

Attachment  
Sequence No. **09**

▶ Go to [www.irs.gov/ScheduleC](http://www.irs.gov/ScheduleC) for instructions and the latest information.  
▶ Attach to Form 1040, 1040-SR, 1040-NR, or 1041; partnerships generally must file Form 1065.

Name of proprietor	Social security number (SSN)
<b>A</b> Principal business or profession, including product or service (see instructions)	<b>B</b> Enter code from instructions ▶
<b>C</b> Business name. If no separate business name, leave blank.	<b>D</b> Employer ID number (EIN) (see instr.)
<b>E</b> Business address (including suite or room no.) ▶ City, town or post office, state, and ZIP code	
<b>F</b> Accounting method: (1) <input type="checkbox"/> Cash (2) <input type="checkbox"/> Accrual (3) <input type="checkbox"/> Other (specify) ▶	
<b>G</b> Did you "materially participate" in the operation of this business during 2020? If "No," see instructions for limit on losses . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>H</b> If you started or acquired this business during 2020, check here . . . . .	<input type="checkbox"/>
<b>I</b> Did you make any payments in 2020 that would require you to file Form(s) 1099? See instructions . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>J</b> If "Yes," did you or will you file required Form(s) 1099? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No

<b>Part I Income</b>	
<b>1</b> Gross receipts or sales. See instructions for line 1 and check the box if this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked . . . . .	<input type="checkbox"/> <b>1</b>
<b>2</b> Returns and allowances . . . . .	<b>2</b>
<b>3</b> Subtract line 2 from line 1 . . . . .	<b>3</b> 0
<b>4</b> Cost of goods sold (from line 42) . . . . .	<b>4</b>
<b>5</b> <b>Gross profit.</b> Subtract line 4 from line 3 . . . . .	<b>5</b> 0
<b>6</b> Other income, including federal and state gasoline or fuel tax credit or refund (see instructions) . . . . .	<b>6</b>
<b>7</b> <b>Gross income.</b> Add lines 5 and 6 . . . . .	<b>7</b> 0

<b>Part II Expenses.</b> Enter expenses for business use of your home <b>only</b> on line 30.	
<b>8</b> Advertising . . . . .	<b>18</b> Office expense (see instructions) . . . . .
<b>9</b> Car and truck expenses (see instructions) . . . . .	<b>19</b> Pension and profit-sharing plans . . . . .
<b>10</b> Commissions and fees . . . . .	<b>20</b> Rent or lease (see instructions):
<b>11</b> Contract labor (see instructions) . . . . .	<b>a</b> Vehicles, machinery, and equipment . . . . .
<b>12</b> Depletion . . . . .	<b>b</b> Other business property . . . . .
<b>13</b> Depreciation and section 179 expense deduction (not included in Part III) (see instructions) . . . . .	<b>21</b> Repairs and maintenance . . . . .
<b>14</b> Employee benefit programs (other than on line 19) . . . . .	<b>22</b> Supplies (not included in Part III) . . . . .
<b>15</b> Insurance (other than health) . . . . .	<b>23</b> Taxes and licenses . . . . .
<b>16</b> Interest (see instructions):	<b>24</b> Travel and meals:
<b>a</b> Mortgage (paid to banks, etc.) . . . . .	<b>a</b> Travel . . . . .
<b>b</b> Other . . . . .	<b>b</b> Deductible meals (see instructions) . . . . .
<b>17</b> Legal and professional services . . . . .	<b>25</b> Utilities . . . . .
	<b>26</b> Wages (less employment credits) . . . . .
	<b>27a</b> Other expenses (from line 48) . . . . .
	<b>b</b> Reserved for future use . . . . .
<b>28</b> <b>Total expenses</b> before expenses for business use of home. Add lines 8 through 27a . . . . .	<b>28</b> 0
<b>29</b> Tentative profit or (loss). Subtract line 28 from line 7 . . . . .	<b>29</b> 0
<b>30</b> Expenses for business use of your home. Do not report these expenses elsewhere. Attach Form 8829 unless using the simplified method. See instructions. <b>Simplified method filers only:</b> Enter the total square footage of (a) your home: _____ and (b) the part of your home used for business: _____. Use the Simplified Method Worksheet in the instructions to figure the amount to enter on line 30. . . . .	<b>30</b>
<b>31</b> <b>Net profit or (loss).</b> Subtract line 30 from line 29. • If a profit, enter on both <b>Schedule 1 (Form 1040), line 3</b> , and on <b>Schedule SE, line 2</b> . (If you checked the box on line 1, see instructions). Estates and trusts, enter on <b>Form 1041, line 3</b> . • If a loss, you <b>must</b> go to line 32.	<b>31</b>
<b>32</b> If you have a loss, check the box that describes your investment in this activity. See instructions. • If you checked 32a, enter the loss on both <b>Schedule 1 (Form 1040), line 3</b> , and on <b>Schedule SE, line 2</b> . (If you checked the box on line 1, see the line 31 instructions). Estates and trusts, enter on <b>Form 1041, line 3</b> . • If you checked 32b, you <b>must</b> attach <b>Form 6198</b> . Your loss may be limited.	<b>32a</b> <input type="checkbox"/> All investment is at risk. <b>32b</b> <input type="checkbox"/> Some investment is not at risk.