

DAVID A. KINSER & ASSOCIATES, INC
Tax Preparation and/or Representation
DAK-INC.com
2334 Valrico Forest Drive
Valrico, FL 33594-3711
DavidKinser@TampaBay.rr.com
.....

David A. Kinser & Associates, Inc. helps you comply with all Federal tax requirements. To do so, this document must be carefully reviewed and then signed and dated. Our attorney informs us that we cannot touch a return without signature(s). If the return(s) prepared are for a married couple, then both must sign.

TO: David A Kinser & Associates, Inc.

I/WE confirm that all of the information submitted to David A. Kinser & Assoc., Inc. is accurate to the best of my/our knowledge and that I/we have maintained lists, logs, diaries, etc of the information submitted. I/we also agree that careful review by involved parties will occur before signing and filing any returns.

I/WE confirm that we understand and agree to the following fees and payment terms: Statements are due upon receipt. Our current rates are \$35.00 to \$150.00 per hour. Due to the high cost of postage, it will be added to your bill. Our fees for "Expert Witness" work/time which includes Court appearances and IRS audits or appeals representation are higher. Any travel will be billed at the IRS allowable mileage rate. Travel over 50 miles (one way) will be billed at direct cost. This could include airfare and/or lodging. Interest is charged on any statement remaining unpaid more than one (1) month. The rate used is 1% per month or 12% per year. If it becomes necessary to use the services of an attorney to collect past due fees, the client agrees to pay a reasonable attorney fee plus costs. If, at any time, for any reason, we are summoned to court, you will be billed for any travel, expenses, and time. The venue for any disputes regarding this contract shall be Hillsborough County, Florida.

PRINTED NAME: _____

SIGNATURE: _____ **DATE** _____

PRINTED NAME: _____

SIGNATURE: _____ **DATE** _____

* * * * *

Do you need extra paper copies of your tax return (banks, schools, etc.)? YES [] NO []

If YES, how many **copies**? _____

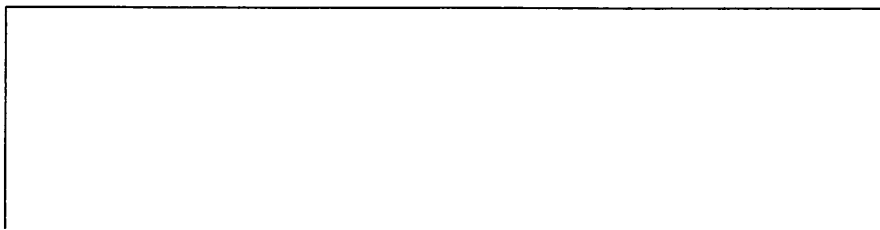
All records, receipts, cancelled checks and other documents utilized to prepare tax returns should be retained by you for a minimum of six (6) years AFTER you file your return for possible verification by the Internal Revenue Service. Everything submitted to David A. Kinser & Associates, Inc. will be scanned and returned to you. If you would like to have a copy of our scanned documents, submit a flash drive with your name on it.

Is a **flash drive** included? YES [] NO []

If you are to receive a refund, the Treasury Department will automatically send you a check. If you would prefer to have your refund direct deposited to your bank, attach a voided check to this document.

Is a **voided check** included? YES [] NO []

.....



This Tax Organizer is designed to help you collect and report the information needed to prepare your 2020 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2020 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2019 information is included for your reference. You do not need to make any 2019 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- A copy of your 2019 tax return (if not in our possession).
- Original Form(s) W-2.
- Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- Copies of other compensation or pension documentation, such as Form 1099-MISC, Form 1099-R, or Form 1099-NEC.
- Form(s) 1099 or statements reporting dividend and interest income.
- Brokerage statements showing transactions for stocks, bonds, etc.
- Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- Copies of closing statements regarding the sale or purchase of real property.
- All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

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General Questions

ORG3

PERSONAL INFORMATION

- | | Yes | No |
|---|--------------------------|--------------------------|
| 1 Did you receive an Economic Impact (Stimulus) Payment? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, how much did you receive? | | |
| 2 Did your marital status change during 2020? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes , explain | | |
| 3 Do you want to allow your tax preparer to discuss this year's return with the IRS? | <input type="checkbox"/> | <input type="checkbox"/> |
| If no , enter another person (if desired) to be allowed to discuss this return with the IRS.
Caution: Review any transferred information for accuracy. | | |
| Designee's Name ▶ | | |
| Phone Number ▶ | | |
| Personal Identification Number (5 digit PIN) ▶ | | |
| 4 Do you or your spouse plan to retire in 2021? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 Were you or your spouse permanently and totally disabled in 2020? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 Enter date of death for taxpayer or spouse (if during 2020 or 2021): Taxpayer: _____ Spouse: _____ | | |
| 7 Were you or your spouse a member of the U.S. Armed Forces during 2020? | <input type="checkbox"/> | <input type="checkbox"/> |

DEPENDENT INFORMATION

- | | Yes | No |
|--|--------------------------|--------------------------|
| 8 a Do you have dependents who must file? | <input type="checkbox"/> | <input type="checkbox"/> |
| b If yes , do you want us to prepare the return(s)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 a Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,200? | <input type="checkbox"/> | <input type="checkbox"/> |
| b If yes , do you want to include your child's income on your return? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 Are any of your dependents not U.S. citizens or residents? | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 Did you provide over half the support for any other person during 2020? | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 Did you incur adoption expenses during 2020? | <input type="checkbox"/> | <input type="checkbox"/> |

IRA, PENSION AND EDUCATION SAVINGS PLANS

- | | Yes | No |
|--|--------------------------|--------------------------|
| 13 Did you take a retirement account distribution related to the corona virus or a natural disaster? | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 Did you receive payments from a pension or profit-sharing plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 a Did you convert all or part of a regular IRA into a Roth IRA? | <input type="checkbox"/> | <input type="checkbox"/> |
| b Did you roll over all or part of a qualified plan into a Roth IRA? | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 Did you contribute to a Coverdell Education Savings Account? | <input type="checkbox"/> | <input type="checkbox"/> |

ITEMS RELATED TO INCOME/LOSSES

- | | Yes | No |
|---|--------------------------|--------------------------|
| 18 Did you receive any disability payments in 2020? | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 Did you receive tip income not reported to your employer? | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 a Did you buy, sell, refinance, or abandon a principal residence or other real property in 2020? (Attach copies of any escrow statements or Forms 1099.) | <input type="checkbox"/> | <input type="checkbox"/> |
| b If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home? | <input type="checkbox"/> | <input type="checkbox"/> |
| c Are you planning to purchase a home soon? | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 Did you incur any casualty or theft losses during 2020? | <input type="checkbox"/> | <input type="checkbox"/> |
| 22 Did you incur any non-business bad debts? | <input type="checkbox"/> | <input type="checkbox"/> |

PRIOR YEAR TAX RETURNS

- | | Yes | No |
|--|--------------------------|--------------------------|
| 23 Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes , enclose agent's report or notice of change. | | |
| 24 Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return? | <input type="checkbox"/> | <input type="checkbox"/> |

General Questions (continued)

ORG3

FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

	Yes	No
25 Did you have foreign income or pay any foreign taxes in 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
26 a At any time during 2020, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?	<input type="checkbox"/>	<input type="checkbox"/>
b Did the aggregate value of all your foreign accounts exceed \$10,000 at any time during 2020 ? Report all interest income on Org 11	<input type="checkbox"/>	<input type="checkbox"/>
27 Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust?	<input type="checkbox"/>	<input type="checkbox"/>
28 Did you at any time during 2020, have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded \$50,000 in value at any time during the year?	<input type="checkbox"/>	<input type="checkbox"/>

HEALTH AND LIFE INSURANCE

	Yes	No
29 Did you receive Form 1095-A (Health Coverage)? If so, please attach.....	<input type="checkbox"/>	<input type="checkbox"/>
30 a Did you or your spouse have self-employed health insurance?	<input type="checkbox"/>	<input type="checkbox"/>
b If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?	<input type="checkbox"/>	<input type="checkbox"/>
31 Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries named by you?	<input type="checkbox"/>	<input type="checkbox"/>
32 Did you contribute to or receive distributions from a Health Savings Account (HSA)?	<input type="checkbox"/>	<input type="checkbox"/>

MISCELLANEOUS

	Yes	No
33 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2020 ? If yes, please attach details.....	<input type="checkbox"/>	<input type="checkbox"/>
34 Did you start paying mortgage insurance premiums in 2020 ? If yes, please attach details	<input type="checkbox"/>	<input type="checkbox"/>
35 Did you purchase a motor vehicle or boat during 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, attach documentation showing sales tax paid.		
36 Did you purchase an energy efficient vehicle in 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, enter year, make, model, and date purchased: _____		
37 Did you donate a vehicle in 2020 ? If yes, attach Form 1098C	<input type="checkbox"/>	<input type="checkbox"/>
38 What was the sales tax rate in your locality in 2020 ? _____ % State ID		
39 Did you or your spouse make gifts of over \$15,000 to an individual or contribute to a prepaid tuition plan?	<input type="checkbox"/>	<input type="checkbox"/>
40 Did you make gifts to a trust?	<input type="checkbox"/>	<input type="checkbox"/>
41 If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach details.		
42 Did you or your spouse participate in a medical savings account in 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)		
43 Did you make a loan at an interest rate below market rate?	<input type="checkbox"/>	<input type="checkbox"/>
44 Did you pay any individual for domestic services in 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
45 Did you pay interest on a student loan for yourself, your spouse, or your dependents?	<input type="checkbox"/>	<input type="checkbox"/>
46 Did you, your spouse, or your dependents attend post-secondary school in 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
47 Did a lender cancel any of your debt in 2020 ? (Attach any Forms 1099-A or 1099-C)	<input type="checkbox"/>	<input type="checkbox"/>
48 Did you receive any income not included in this Tax Organizer?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach information.		
49 At any time during 2020, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ..	<input type="checkbox"/>	<input type="checkbox"/>
50 a Did you obtain a Paycheck Protection Program (PPP) loan?	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, has any portion of that loan been forgiven?	<input type="checkbox"/>	<input type="checkbox"/>

ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

	Yes	No
51 If your tax return is eligible for Electronic Filing, would you like to file electronically?	<input type="checkbox"/>	<input type="checkbox"/>
52 The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	<input type="checkbox"/>	<input type="checkbox"/>

Caution: Review transferred information for accuracy.

53 If yes, please provide the following information:

a Name of your financial institution	_____
b Routing Transit Number (must begin with 01 through 12 or 21 through 32)	_____
c Account number	_____
d What type of account is this?	Checking <input type="checkbox"/> Savings <input type="checkbox"/>

Please attach a **voided** check (not a deposit slip) if your bank account information has changed.

Health Insurance Coverage

ORG3A

Preparer note: The fields on this form are non-enterable. This worksheet is meant to gather client data only. This worksheet will not transfer to the ProSeries/1040 product. Data from this worksheet must be manually entered on the appropriate form in ProSeries/1040.

Part 1 Coverage																		
Enter the name, SSN/DOB and health insurance status for each person who will claim on your return in the table below:																		
Name of covered individual(s)	SSN or DOB	Covered 12 mos	Exchange Policy	Exemption Received	Indicate which months each person was covered by MEC*:													
					Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
7.																		
8.																		
9.																		

*Minimum Essential Coverage (MEC) includes employer-sponsored coverage, health insurance purchased through the Health Insurance Marketplace (Exchange), Medicare, Medicaid, certain VA coverage, Tricare, etc.

For tax year 2020, the Federal ACA tax penalty has been eliminated, however, you may still be subject to a state tax penalty depending on where you live because some states have created their own individual insurance mandates to replace the federal version. These mandates require state residents to have qualifying health coverage or pay a fee with their state taxes.

Use this worksheet to list the names of individuals listed on the income tax return and their health care insurance coverage status. It will help your tax preparer determine who has health insurance coverage.

If you purchased a health insurance policy from an exchange (or Marketplace), check the Exchange Policy box above. You will receive Form 1095-A from the exchange that issued your policy. Please provide this form with your Organizer documents to your tax preparer.

Please call with any questions on this worksheet.

ORG3A

Business/Investment Questions

ORG4

	Yes	No
1 Did you receive stock from a stock bonus plan with your employer? (Do not include stock sales included on your W-2.)	<input type="checkbox"/>	<input type="checkbox"/>
2 Did you buy or sell any stocks or bonds in 2020 ? If yes , attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you surrender any U.S. savings bonds during 2020 ?.....	<input type="checkbox"/>	<input type="checkbox"/>
4 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation?	<input type="checkbox"/>	<input type="checkbox"/>
6 Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?	<input type="checkbox"/>	<input type="checkbox"/>
7 Do you have any investments for which you were not personally 'at risk' (other than sole proprietorship or farm)?	<input type="checkbox"/>	<input type="checkbox"/>
8 Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
9 Did you sell property or equipment on installment in 2020?	<input type="checkbox"/>	<input type="checkbox"/>
10 Did you have any business related educational expenses?	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you do a 'like-kind' exchange of property in 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
12 Deductions for travel and meals may be allowed under certain circumstances. Adequate records must be presented. Information must include: 1 Amount; 2 Time and place; 3 Date; 4 Business purpose; 5 Description of gift(s); and 6 Business relationship of recipient Do you have records to support expenses?	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you purchase special fuels for non-highway use?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please list the type of use and the number of gallons for each fuel.		
<hr/>		
<hr/>		
<hr/>		
<hr/>		
<hr/>		

PERSONAL INFORMATION

	TAXPAYER	SPOUSE
Last name.....	_____	_____
First name.....	_____	_____
Middle initial and suffix.....	MI..... Suffix.....	MI..... Suffix.....
Social security number.....	_____	_____
Occupation.....	_____	_____
Work phone/extension.....	_____	_____
Cell phone.....	_____	_____
E-mail address.....	_____	_____
Driver's License/Id issuing state....	_____	_____
License /Id number.....	_____	_____
License/Id issue date.....	_____	_____
License/Id expiration date.....	_____	_____
Birthdate.....	MM/DD/YYYY.....	MM/DD/YYYY.....
Blind.....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Contribute to Presidential Election Campaign Fund.....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Eligible to be claimed as a dependent on another return.....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Street address.....	_____	Apartment number..... _____
City.....	_____ State..... _____	ZIP code..... _____
Home phone.....	_____ Foreign country..... _____	_____
Fax.....	_____ Foreign phone..... _____	_____

FILING STATUS

1 Single

2 Married filing jointly

3 Married filing separately

Check this box if you **did not** live with spouse at any time during the year..... ▶

Check this box if you are eligible to claim spouse's exemption..... ▶

Check this box if your spouse itemizes deductions..... ▶

4 Head of household

If the qualifying person is a child but not your dependent, enter

Child's name..... Child's social security number.....

5 Qualifying widow(er)

Check the box for the year the spouse died..... ▶ 2018 2019

DEPENDENT INFORMATION

Full Name (first name, middle initial, last name, suffix)	Social Security Number	**Code	Not qua- lified credit Other dep	Date of Birth	2020 Child Care Expense
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	

** For the Dependent Code, enter the following:

- L = dependent child who lived with you
- N = dependent child who didn't live with you due to divorce or separation
- O = other dependent
- Q = not a dependent (but is a person who qualifies your client for the earned income credit and/or the credit for child and dependent care expenses)

+ Enter the number of months dependent lived with you, and/or your spouse if married filing jointly, in the U.S.

* Check this box if dependent child is not a U.S. citizen or resident alien

W-2 – WAGES, SALARIES, TIPS, AND OTHER COMPENSATION

Attach all copies of your W-2 forms here.

1	Employer's name	Check if not applicable for 2020	<input type="checkbox"/>
	Employer's name	Check if for spouse	<input type="checkbox"/>
	1 Check if this employer hired an on-staff care provider or furnished dependent care at your workplace		<input type="checkbox"/>
	2 Enter any amounts forfeited from a flexible spending account		_____
	3 Check if the income reported is from a foreign source		<input type="checkbox"/>
	4 a Clergy: Enter your designated housing or parsonage allowance		_____
	b Clergy: Enter smallest of (a) the designated housing or parsonage allowance, (b) amount spent on qualifying housing expenses, or (c) fair rental value		_____
	c Check SE tax on: (a) housing or parsonage allowance	(b) W-2 wages	(c) both
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2	Employer's name	Check if not applicable for 2020	<input type="checkbox"/>
	Employer's name	Check if for spouse	<input type="checkbox"/>
	1 Check if this employer hired an on-staff care provider or furnished dependent care at your workplace		<input type="checkbox"/>
	2 Enter any amounts forfeited from a flexible spending account		_____
	3 Check if the income reported is from a foreign source		<input type="checkbox"/>
	4 a Clergy: Enter your designated housing or parsonage allowance		_____
	b Clergy: Enter smallest of (a) the designated housing or parsonage allowance, (b) amount spent on qualifying housing expenses, or (c) fair rental value		_____
	c Check SE tax on: (a) housing or parsonage allowance	(b) W-2 wages	(c) both
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1099-R – DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC

Attach all copies of your 1099-R forms here.

1	Payer's name	Check if not applicable for 2020	<input type="checkbox"/>
	Payer's name	Check if for spouse	<input type="checkbox"/>
	1 Check if either box applies: Rollover	Conversion to Roth IRA	<input type="checkbox"/>
	2 a If a partial rollover, enter the amount rolled over		_____
	b If a partial conversion to a Roth IRA, enter the amount converted to Roth IRA		_____
	3 Health insurance premiums deductible on Schedule A		_____
	4 a If entire distribution is a Required Minimum Distribution (RMD), check this box		<input type="checkbox"/>
	b If only part of distribution is RMD, enter the part that is RMD		_____

2	Payer's name	Check if not applicable for 2020	<input type="checkbox"/>
	Payer's name	Check if for spouse	<input type="checkbox"/>
	1 Check if either box applies: Rollover	Conversion to Roth IRA	<input type="checkbox"/>
	2 a If a partial rollover, enter the amount rolled over		_____
	b If a partial conversion to a Roth IRA, enter the amount converted to Roth IRA		_____
	3 Health insurance premiums deductible on Schedule A		_____
	4 a If entire distribution is a Required Minimum Distribution (RMD), check this box		<input type="checkbox"/>
	b If only part of distribution is RMD, enter the part that is RMD		_____

W-2G – GAMBLING OR LOTTERY WINNINGS

Attach all copies of your W-2G forms here.

Name of Payer	Check if Spouse	Reportable Winnings (Box 1)	Federal Tax Withheld (Box 4)	State Tax Withheld (Box 15)	State Code (Box 13)
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

W-2 Amounts

ORG7A

WAGES, SALARIES, TIPS, AND OTHER COMPENSATION					
Box	Description	2020		2019	
c	Employer's name (from ORG7)				
1	Wages, tips, etc				
2	Federal income tax withheld				
3	Social security wages				
4	Social security tax				
5	Medicare wages/tips				
6	Medicare tax withheld				
13b	Check if retirement plan participant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Social security tips				
8	Allocated tips				
	Unreported tips less than \$20 per month				
	Unreported tips \$20 or more per month				
9	(Not used)				
10	Dependent care				
11	Nonqualified plans				
13a	Check if statutory employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13c	Check if third-party sick pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Box 12 W-2 Code	2020 Box 12 Amount	2019 Box 12 Amount	2020	2019
			If Box 12 code is:	
			A: Attributable to RR Tier 2 tax	
			M: Attributable to RR Tier 2 tax	
			R: Taxpayer MSA	
			Spouse MSA	
			<input type="checkbox"/>	<input type="checkbox"/>
			G: Not government employer	

If Box 12 Code P - Link to Form 3903 in 2020 ProSeries

2020 Box 14 Description or Code	2020 Box 14 Amount	2019 Box 14 Description or Code	2019 Box 14 Amount

Box 15 State	2020 Box 16 Wages, tips, etc	2020 Box 17 Income tax	2019 Box 16 Wages, tips, etc	2019 Box 17 Income tax

Box 20 Locality	2020 Box 18 Wages, tips, etc	2020 Box 19 Income tax	2019 Box 18 Wages, tips, etc	2019 Box 19 Income tax

1099-R Amounts

ORG7B

Source From: 1099-R CSA-1099-R CSF-1099-R RRB-1099-R



Payer's name.....

Box	Description	2020	2019
		<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
	Federal income tax withheld.....		
	▶ ▶ ▶ Check if a qualified Roth IRA distribution, but box 7 code is J or T, not code Q ▶ If a fully taxable disability pension, check if recipient is under the minimum retirement age	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	State tax withheld – State 1..... State tax withheld – State 2.....		
	State/Payer's state number – State 1..... State/Payer's state number – State 2.....		
	State distribution – State 1..... State distribution – State 2.....		
	Local tax withheld – Locality 1..... Local tax withheld – Locality 2.....		
	Name of locality – Locality 1..... Name of locality – Locality 2.....		
	Local distribution – Locality 1..... Local distribution – Locality 2.....		
	Inherited IRA If this distribution is from an inherited IRA, indicate the distribution is from the IRA of ▶ Spouse and treat as recipient's own (treat as rollover)..... ▶ Recipient, but originally was inherited from spouse's (own IRA)..... ▶ Spouse and not treat as recipient's own (taxable amount in box 2a)..... ▶ Someone other than a spouse (taxable amount in box 2a).....	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

1099-MISC Income and 1099-NEC Income

ORG8

MISCELLANEOUS INCOME

Attach all copies of 1099-MISC and 1099-NEC forms here.

Box	Description	Payer 1	Payer 2	Payer 3
	Check if spouse.....			
	Check if you did not receive income from this payer in 2020.....			
	Payer's name.....			
	Payer's federal identification number or Payer's social security number.....			
1	Rents			
2	Royalties			
3	Other income.....			
4	Federal income tax withheld.....			
5	Fishing boat proceeds			
6	Medical/health care payments.....			
1	Nonemployee compensation (Form 1099-NEC).....			
8	Substitute payments			
10	Crop insurance proceeds.....			
13	Excess golden parachute payments.....			
14	Gross proceeds paid to an attorney.....			
15a	Section 409A deferrals			
15b	Section 409A income.....			
16	State tax withheld – 1st state.....			
17	State name – two letters – 1st state..... Payer's state number – 1st state.....			
18	State income – 1st state.....			
16	State tax withheld – 2nd state.....			
17	State name – two letters – 2nd state..... Payer's state number – 2nd state.....			
18	State income – 2nd state.....			
	FATCA filing requirement	<input type="checkbox"/>		

Social Security Benefits/Form 1099-G/Other Income

ORG10

SOCIAL SECURITY BENEFITS

<input checked="" type="checkbox"/> Attach all copies of SSA and RRB forms.		Taxpayer	Spouse
1	Social Security Benefits from Form SSA-1099		
2	Federal income tax withheld from Form SSA-1099		
3	Medicare B premiums withheld from Form SSA-1099		
4	Medicare C premiums withheld from Form SSA-1099		
5	Medicare D premiums withheld from Form SSA-1099		
6	Railroad Retirement Benefits from Form RRB-1099		
7	Federal income tax withheld from Form RRB-1099		
8	Medicare premiums withheld from Form RRB-1099		

FORM 1099-G

<input checked="" type="checkbox"/> Attach all copies of 1099-G forms.		Payer 1	Payer 2	Payer 3
Box	Description			
	Check if Spouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Check if Joint.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Payer's name.....			
1	Unemployment compensation			
a	Unemployment benefits you repaid in 2020			
2	State and local income tax refunds			
3	Enter the tax year from 1099-G box 3			
a	If tax year is 2019 or prior, enter the taxable portion of the amount reported in box 2			
4	Federal income tax withheld			
5	RTAA payments.....			
6	Taxable grants			
7	Agriculture payments			
8	Check if box 2 amount is from trade or business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Market gain			
10a	Two-letter state abbreviation	---	---	---
	Two or three-letter local abbreviation	---	---	---
b	State identification number			
11	State income tax withheld.....			

OTHER INCOME

Nature and Source		2020 Taxpayer	2020 Spouse	2019 Combined
1	Alimony received			
2	Recovery of bad debts previously deducted			
3	Jury duty pay			
4	Gambling winnings not reported on W2G/1099.....			
5	Income from not for profit activities (hobbies).....			
6	Income from the rental of personal property.....			
7	Non-Government unemployment received/repaid in 2020			
8	Other Taxable income:			
a	Union unemployment benefits.....			
b	Private fund unemployment benefits.....			
c	State employee unemployment benefits			
9	Other miscellaneous income items: Description:			

1099-INT Amounts

ORG11A

	Interest Income	2020	2019
Box	Payer Name		
2	Early withdrawal penalty		
4	Federal taxes withheld		
5	Investment expenses		
6	Foreign taxes paid		
7	Foreign country		
9	Private activity bond interest		
	OR		
	Percent of private activity bond amount included in total interest. (Enter 75 percent as 75.00)		
11	Bond premium		
12	Bond premium on treasury obligations		
13	Bond premium on tax-exempt bond		
14	Tax-exempt and tax credit bond CUSIP number		
15a	State (postal code)		
15a	State Identification number		
15a	State taxes withheld		
15b	State (postal code)		
15b	State Identification number		
15b	State taxes withheld		
If state withholding is entered above, indicate the form type: <input type="checkbox"/> 1099-INT <input type="checkbox"/> 1099-OID Types of adjustments:* <input type="checkbox"/> N <input type="checkbox"/> O <input type="checkbox"/> B <input type="checkbox"/> R <input type="checkbox"/> T <input type="checkbox"/> A <input type="checkbox"/> H <input type="checkbox"/> U Amount of adjustment			
*Type of adjustment: N = Nominee distribution O = Original issue discount (OID) adjustment B = Amortizable bond premium (ABP) adjustment R = Bond premium on treasury obligations T = Bond premium on tax-exempt bonds A = Accrued interest adjustment H = Other adjustment U = U.S. Savings bond interest previously reported			
	FATCA filing requirement		

DIVIDEND INCOME

ORG11B

Box	Form 1099-DIV	2020	2019
	Payer Name		
2b	Unrecaptured Section 1250 gain		
2c	Section 1202 gain:		
	Amount eligible for 50% exclusion		
	Amount eligible for 60% exclusion		
	Amount eligible for 75% exclusion		
	Amount eligible for 100% exclusion		
2d	Collectibles (28%) gain		
3	Nondividend distributions (Nontaxable distributions)		
4	Federal taxes withheld		
5	Section 199A dividends		
6	Investment expenses		
7	Foreign tax paid		
8	Foreign country		
11	Exempt-interest dividends (not included in box 1 or box 3)		
12	Private activity bond amount included above		
	OR		
	Percent of private activity bond amount included in total exempt-interest dividends (Enter 75 percent as 75.00)		
13a	State (postal code)		
14a	State Identification number		
15a	State taxes withheld		
13b	State (postal code)		
14b	State Identification number		
15b	State taxes withheld		
	U.S. government interest in dividends		
	Margin interest paid in 2020		
Types of adjustments:			
	Nominee <input type="checkbox"/>	Other <input type="checkbox"/>	ESOP <input type="checkbox"/>
	Amount of adjustment		
	FATCA filing requirement		

Seller-Financed Interest/Child's Interest and Dividends

ORG12

T = Taxpayer, S = Spouse, J = Joint

SELLER-FINANCED MORTGAGE INTEREST					
TSJ	*X	Name of Payer	Address	SSN or EIN	Amount

*X Check if you did not receive interest from this payer in 2020.

CHILD'S INTEREST AND DIVIDENDS (greater than \$1,100)			
*X	Child's Name	2020	2019
	First name _____ MI ____		
	Last name _____ Suffix ____ SSN _____		
	Child's taxable interest		
	Child's tax-exempt interest.....		
	Child's ordinary dividends.....		
	Child's capital gain distributions		
	First name _____ MI ____		
	Last name _____ Suffix ____ SSN _____		
	Child's taxable interest		
	Child's tax-exempt interest.....		
	Child's ordinary dividends.....		
	Child's capital gain distributions		
	First name _____ MI ____		
	Last name _____ Suffix ____ SSN _____		
	Child's taxable interest		
	Child's tax-exempt interest.....		
	Child's ordinary dividends.....		
	Child's capital gain distributions		

*X Check if this child did not receive interest or dividend income in 2020.

Medical and Tax Expenses

ORG13

MEDICAL AND DENTAL EXPENSES	2020	2019
1 Prescription medications.....		
2 Health insurance premiums (enter Medicare B on ORG10)..... Exclude premiums paid through an exchange (Form 1095-A)		
3 Qualified long-term care premiums		
a Taxpayer's gross long-term care premiums		
b Spouse's gross long-term care premiums		
c Dependent's gross long-term care premiums		
4 Enter self-employed health insurance premiums on ORG19, ORG27, ORG45A, or ORG46A for the appropriate activity.....		
5 Insurance reimbursement.....		
6 Doctors, dentists, etc		
7 Hospitals, clinics, etc		
8 Lab and X-ray fees.....		
9 Expenses for qualified long-term care.....		
10 Eyeglasses and contact lenses		
11 Medical equipment and supplies		
12 Miles driven for medical purposes.....		
13 Ambulance fees and other medical transportation costs		
14 Lodging.....		
15 Other medical and dental expenses:		
a _____		
b _____		
c _____		
d _____		
e _____		
f _____		
g _____		
h _____		
i _____		
j _____		

TAXES	2020	2019
Enter state and local income taxes on ORG7, ORG8, ORG10, and ORG40.		
16 Real estate taxes paid on principal residence		
17 Real estate taxes paid on additional homes or land		
18 Auto registration fees based on the value of the vehicle.....		
19 Other personal property taxes		
20 Other taxes:		

Interest Paid and Cash Contributions

ORG14

HOME MORTGAGE INTEREST PAID			
Lender's Name	Check if NOT on Form 1098	2020	2019
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		

POINTS PAID ON LOAN TO BUY, BUILD, OR IMPROVE MAIN HOME		
Lender's Name	Check if NOT on Form 1098	2020
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

SELLER FINANCED MORTGAGE		
Individual's Name	Identifying Number	Address

OTHER PERSON RECEIVING FORM 1098	
Form 1098 Recipient's Name	Address

OTHER POINTS					
Enter below any points paid on a home equity loan (other than to improve your main home), a loan for a second home, or a refinanced mortgage.					
Lender's Name	Loan Over	Points Paid	Date of Loan	Loan Length (years)	2019 Points Deducted
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

QUALIFIED MORTGAGE INSURANCE PREMIUMS		
	2020	2019
Premiums paid in 2020 for qualified mortgage insurance not from Form 1098 import		

Interest Paid and Cash Contributions (continued)

ORG14

INVESTMENT INTEREST		
	2020	2019
Investment interest (for example: margin interest, interest paid on loans used for property held for investment, etc).....		

LIMITED HOME MORTGAGE DEDUCTION					
If the mortgage meets the following reasons during 2020 complete the following: - The principal amount of you mortgage and home equity debt is over \$750,000 (\$375,000 if married filing separate), or - You had home debt that was not used to buy, build or substantially improve the home that secures the loan					
	Loan 1	Loan 2	Loan 3	Loan 4	Loan 5
1a Interest paid in 2020					
Points paid in 2020					
Months loan outstanding					
Principal pd on loan in 2020					
b Was all proceeds of this loan used to buy, build, or substantially improve the home? Yes: <input type="checkbox"/> No: <input type="checkbox"/> Yes: <input type="checkbox"/> No: <input type="checkbox"/> Yes: <input type="checkbox"/> No: <input type="checkbox"/> Yes: <input type="checkbox"/> No: <input type="checkbox"/> Yes: <input type="checkbox"/> No: <input type="checkbox"/>					
2 Home Debt Origination on or after December 15, 2017					
Beginning of year balance ..					
Additional borrowed in 2020					
Enter the amount of debt not used to buy, build, or substantially improve the home:					
3 Home Debt Origination after October 13, 1987 and Before December 15, 2017					
Beginning of year balance ..					
Enter the amount of debt not used to buy, build, or substantially improve the home:					
4 Grandfathered debt: (before 10/14/1987)					
Beginning of year balance ..					
Enter the amount of debt not used to buy, build, or substantially improve the home:					

CASH CONTRIBUTIONS			
Name of Donee Organization	Check if Statement Exists for Gifts \$250 or More	2020	2019
			<input type="checkbox"/>
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
Charitable miles driven.....			
Miles driven to deliver noncash contributions			
Parking fees, tolls, and local transportation			

Noncash Contributions

ORG14A

Name of Donee Organization	Check if Statement Exists for Gifts of \$250 or More	Fair Market Value	Prior Year Fair Market Value
A _____			
B _____			
C _____			
D _____			
E _____			
F _____			
G _____			
H _____			
I _____			

Note: Complete sections below **only** if the **total** noncash contributions are **more than \$500**.

Description of Donated Property	Type**	Address of Donee Organization
A _____		
B _____		
C _____		
D _____		
E _____		
F _____		
G _____		
H _____		
I _____		

Method for Fair Market Value*	Date of Contribution	Complete these columns only for each contribution over \$500		
		Date Acquired (month, year)	How Acquired***	Your Cost
A _____				
B _____				
C _____				
D _____				
E _____				
F _____				
G _____				
H _____				
I _____				

***Methods of determining FMV:**

- | | | | |
|---------------|--------------------------|-------------------|-------------|
| Appraisal | Capitalization of income | Present value | Thrift shop |
| Average share | Comparative sales | Replacement cost | |
| Catalog | Consignment shop | Reproduction cost | |

****Type of Donated Property**

- | | | |
|---------------------------------|-----------------------------------|--|
| Household/clothing items | Business equipment | Intellectual property |
| Motor vehicle, boat or airplane | Business inventory | Real property, conservation property |
| Art, other than self-created | Stock, publicly traded | Real property, other than conservation |
| Art, self-created | Stock, other than publicly traded | Other personal property |
| Collectibles | Securities, other than stock | Other intangible property |

*****How Property was Acquired:** Purchase, Gift, Inheritance, Exchange

Miscellaneous Itemized Deductions (FOR STATE USE ONLY)

ORG15

MISCELLANEOUS DEDUCTIONS (2% LIMITATION)	2020	2019
Employee Business Expenses		
Note: If you have any travel, transportation, meal expenses or your employer reimbursed you for any of your job-related expenses, complete ORG17 for all your employee expenses.		
1 Union and professional dues		
2 Professional subscriptions		
3 Uniforms and protective clothing		
4 Job search costs		
5 Other unreimbursed employee expenses:		
a _____		
b _____		
c _____		
d _____		
e _____		
Other Expenses Subject to the 2% Limitation		
Treat all MACRS assets for this activity as qualified Indian reservation property?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Treat all assets acquired after August 27, 2005 as qualified GO Zone property?	<input type="checkbox"/> Regular	<input type="checkbox"/> Extension
Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Was this property located in a Qualified Disaster Area?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Check to code assets as Investment Expense	<input type="checkbox"/>	
Use ORG50 to record dispositions.		
Use ORG51A to enter additional assets.		
Use ORG11a for investment expenses related to interest income.		
Use ORG11b for investment interest related to dividend income.		
6 Tax return preparation fees		
7 Investment counsel and advisory fees		
8 Certain attorney and accounting fees		
9 Safe deposit box rental		
10 IRA custodial fees		
11 a Government unemployment benefits repaid in 2020	<input type="checkbox"/>	
b Other expenses (list):		

OTHER MISCELLANEOUS DEDUCTIONS	2020	2019
12 Federal estate tax paid on income in respect of a decedent		
13 Amortizable bond premiums (acquired before 10/23/86)		
14 Gambling losses (to the extent of gambling income)		
15 Claim repayments		
16 Unrecovered investment in annuity		
17 Ordinary loss attributable to certain debt instruments		

Moving Expenses

ORG16

If you sold your principal residence during 2020, also complete Sale of Your Home (ORG22).

FIRST MOVE

If you moved your residence because of a change in job location (taxpayer or spouse), please complete the following information.

Check here **only if all** of the following apply

- You moved in an earlier year
- You are claiming **only** storage fees while you are **away** from the United States
Enter storage fees applicable to you foreign move (no other expenses claimed).
- Any amount your employer paid for the storage fees is included as wages in box 1 of your W-2

Enter the new principal place of work for this move:

New workplace: _____

Enter mileage if required to meet **Distance Test**:

Number of miles from your old home to new workplace _____

Number of miles from your old home to old workplace _____

Are you a member of the armed forces? **Yes** **No**

If **Yes**, did you move due to a permanent change of station? **Yes** **No**

Enter the total amount your employer paid for your move.
Do not enter amounts already reported on Form W-2 Box 12

Description of Expense	Amount
Expenses of transport and storage of household goods and personal effects:	
Expenses of moving from old to new home:	
Travel and lodging expenses for this move (excluding auto and meals)	
Parking fees and tolls paid during this move	
Gasoline and oil expense for this move	
Miles driven traveling to new home for this move	

SECOND MOVE

If you moved your residence because of a change in job location (taxpayer or spouse), please complete the following information.

Check here **only if all** of the following apply

- You moved in an earlier year
- You are claiming **only** storage fees while you are **away** from the United States
Enter storage fees applicable to you foreign move (no other expenses claimed).
- Any amount your employer paid for the storage fees is included as wages in box 1 of your W-2

Enter the new principal place of work for this move:

New workplace: _____

Enter mileage if required to meet **Distance Test**:

Number of miles from your old home to new workplace _____

Number of miles from your old home to old workplace _____

Are you a member of the armed forces? **Yes** **No**

If **Yes**, did you move due to a permanent change of station? **Yes** **No**

Enter the total amount your employer paid for your move.
Do not enter amounts already reported on Form W-2 Box 12

Description of Expense	Amount
Expenses of transport and storage of household goods and personal effects:	
Expenses of moving from old to new home:	
Travel and lodging expenses for this move (excluding auto and meals)	
Parking fees and tolls paid during this move	
Gasoline and oil expense for this move	
Miles driven traveling to new home for this move	

Employee Business Expenses

ORG17

Occupation in which expenses were incurred

Check box if spouse's employee expenses. If blank, taxpayer assumed

Check box if a fee-basis state or local government official

Check box if a Qualifying Performing Artist.....

Check box if armed forces reservist related travel more than 100 miles from home

Check box if impairment-related work expenses.....

Check box if miscellaneous 2% itemized deduction (**state only use**)

Check box if subject to Department of Transportation (DOT) hours of service limits.....

Treat all MACRS assets for activity as qualified Indian reservation property?..... Yes No

Treat all assets acquired after August 27, 2005 as qualified GO Zone property?..... Regular Extension No

Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?..... Yes No

Was this activity located in a Qualified Disaster Area..... Yes No

EXPENSES	2020	2019
1 Parking fees, tolls, and local transportation		
2 Travel expenses while away from home (excluding meal expenses)		
3 Meal expenses.....		
4 Business gifts.....		
5 Education.....		
6 Home office expenses (Preparer Use Only – complete ORG17A)		
7 Trade publications.....		
8 Depreciation expense other than vehicle (Preparer Use Only).....		
9 Carryover of Section 179 expense from prior year		
10 Other:		

EMPLOYER REIMBURSEMENTS	2020	2019
Enter amounts not reported in Box 1 on Form W-2 (include amounts reported under code 'L' in Box 12 of Form W-2).		
11 Reimbursements for other than meals and entertainment		
12 Reimbursements for meals and entertainment		

QUALIFIED PERFORMING ARTIST	2020	2019
13 Did you perform services in the performing arts as an employee for at least two employers during the year, and receive from at least two of those employers wages of \$200 or more per employer?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

IMPAIRMENT-RELATED WORK EXPENSES	2020	2019
14 If you are disabled, were any of your expenses for attendant care at your place of employment, or were any of your expenses in connection with your place of employment that enabled you to work?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Employee Business Expenses (continued)

ORG17

GENERAL VEHICLE INFORMATION		Vehicle 1	Vehicle 2
15	Description of vehicle.....		
16	Date placed in service.....		
17	Enter detail on lines 17a and 17b, or total on line 17c:		
a	Ending mileage reading.....		
b	Beginning mileage reading.....		
c	Total miles for the year (line 17a less line 17b).....		
18	Business miles.....		
19	Total commuting miles.....		
20	Average daily commuting miles.....		
STANDARD MILEAGE RATE		Vehicle 1	Vehicle 2
21	Do you qualify for standard mileage? (Preparer Use Only).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
22	Is this a leased vehicle?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
ACTUAL EXPENSES		Vehicle 1	Vehicle 2
23	Gasoline, oil, repairs, insurance, etc.....		
24	Vehicle registration fee (excluding property tax).....		
25	Vehicle lease or rental fee.....		
26	Inclusion amount (Preparer Use Only).....		
27	Value of employer provided vehicle (only if 100% of annual lease value was included on Form W-2).....		
28	Depreciation (Preparer Use Only).....		
VEHICLE DEPRECIATION/DISPOSITIONS		Vehicle 1	Vehicle 2
29	Cost or basis.....		
30	Is this an electric vehicle?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
31	Is this qualified Indian reservation property?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
32	Type of vehicle (Preparer Use Only).....		
33	Section 179 expense (Preparer Use Only).....		
34	Qualified Property for Economic Stimulus? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
35	Qualified Property for Qualified Disaster Area? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
36	Qualified Property for Kansas Disaster Zone (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
37	Qualified property for GO Zone? (Preparer Use Only).....	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A
38	Percentage for Special Depreciation Allowance? (Preparer Use).....	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> N/A	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> N/A
39	Elect OUT of Special Depreciation Allowance? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
40	Elect 30% in place of 50% Allowance? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
41	Date sold.....		
42	Date acquired, if different from line 16.....		
43	Sales price.....		
44	Expense of sale.....		
45	Gain/loss basis, if different (Preparer Use Only).....		
46	AMT gain/loss basis, if different (Preparer Use Only).....		
VEHICLE QUESTIONS			
47	Was your vehicle available for personal use during off-duty hours?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
48	Is another vehicle available for personal use?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
49	Do you have evidence to support the business use claimed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
50	If yes, is the evidence written?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Employee Home Office Expense

ORG17A

for:

copy:

Simplified method election for Home Office expenses:

Elected the simplified method in 2020 instead of entering actual expenses	<input type="checkbox"/>
Elected the simplified method in 2019 instead of entering actual expenses	<input type="checkbox"/>

GENERAL INFORMATION	2020	2019
1 Area used regularly and exclusively for business, regularly and exclusively for day care, or regularly for inventory storage (square footage)		
2 Area used only partly for day care (square footage).....		
3 Total area of home (square footage)		
4 Daycare hours		
a Number of weeks used for daycare, if less than full year		
b Number of days used for day care each week		
c Number of days closed for holidays, vacations, etc.....		
d Number of hours used for daycare each day		
5 Total wages from this business		
6 Enter the percent of wages above that are from the business use of this home.....		
7 Gain from business use of home shown on Schedule D or Form 4797 (Preparer Use Only) ...		
8 Any losses from this business shown on Schedule D or Form 4797 (Preparer Use Only)		

Enter expenses that benefit only your business area in the 'Direct' column and expenses that benefit your entire home in the 'Indirect' column.

EXPENSES	2020		2019	
	Direct	Indirect	Direct	Indirect
9 Casualty losses (Preparer Use Only)				
10 Mortgage interest/points on Form 1098				
11 Interest not on Form 1098				
12 Points not of Form 1098				
13 Real estate taxes.....				
14 Qualified mortgage insurance				
15 Other insurance				
16 Rent				
17 Repairs and maintenance				
18 Utilities				
19 Other expenses (e.g., rent).....				
20 Carryover of operating expenses.....				
21 Excess casualty losses (Preparer Use Only).....				
22 Depreciation of your home (Preparer Use Only).....				
23 Carryover of excess casualty losses and depreciation				

DEPRECIATION

If your home and any additions or improvements to your home are not already listed on ORG50 for this occupation, please complete the following information.

24	Description	Date Acquired (MM/DD/YY)	Date Placed in Service (MM/DD/YY)	Cost (include land for residence only)
	Residence			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
25	Enter the land value included in cost for residence			

Car And Truck Expenses
(Employees use ORG17 – Employee Business Expenses)

ORG18

for:

GENERAL INFORMATION-	Vehicle 1	Vehicle 2	Vehicle 3
1 Description of vehicle.....			
2 a Date placed in service.....			
b Date acquired, if different from line 2a.....			
3 Enter detail on lines 3a and 3b, or total on line 3c:			
a Ending mileage reading.....			
b Beginning mileage reading.....			
c Total miles for the year (line 3a less line 3b).....			
4 Business miles.....			
5 Total commuting miles.....			
STANDARD MILEAGE RATE	Vehicle 1	Vehicle 2	Vehicle 3
6 Do you qualify for standard mileage? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7 Is this a leased vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
ACTUAL EXPENSES	Vehicle 1	Vehicle 2	Vehicle 3
8 Gasoline, oil, repairs, insurance, etc.....			
9 Vehicle registration fee (excluding property tax).....			
10 Vehicle lease or rental fee.....			
11 Inclusion amount (Preparer Use Only).....			
12 Depreciation (Preparer Use Only).....			
13 Parking fees, tolls, and local transportation.....			
14 Portion of vehicle registration fee based on value.....			
15 Interest on vehicle.....			
DEPRECIATION/DISPOSITIONS	Vehicle 1	Vehicle 2	Vehicle 3
16 Cost or basis.....			
17 Is this an electric vehicle?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
18 Is this qualified Indian reservation property?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
19 Type of vehicle (Preparer Use).....			
20 Section 179 expense (Preparer Use).....			
21 Qualified Property for Economic Stimulus? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
22 Qualified Property for Qualified Disaster Area? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
23 Kansas Disaster Zone? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
24 Qualified GO Zone Property (Preparer Use).....	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A	<input type="checkbox"/> Reg <input type="checkbox"/> Ext <input type="checkbox"/> N/A
25 Percentage for SDA? (Preparer Use).....	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No	<input type="checkbox"/> 100%/50% <input type="checkbox"/> 30% <input type="checkbox"/> No
26 Elect OUT of SDA? (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
27 Elect 30% in place of 50% SDA (Preparer Use).....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
28 Date sold.....			
29 Sales price.....			
30 Expense of sale.....			
31 Gain/loss basis, if different (Preparer Use).....			
32 AMT gain/loss basis, if different (Preparer Use).....			
VEHICLE QUESTIONS	Vehicle 1	Vehicle 2	Vehicle 3
33 Is another vehicle available for personal use?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
34 Was vehicle available during off duty hours?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
35 Was vehicle used primarily by a greater than 5% owner or related person?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
36 Do you have evidence to support the business use claimed?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No
37 If yes , is the evidence written?.....			<input type="checkbox"/> Yes <input type="checkbox"/> No

Business Income and Expenses

ORG19

GENERAL INFORMATION

Is this activity a qualified trade or business under Section 199A? Yes No

1 Check ownership Taxpayer Spouse Joint

2 Business name

3 a Business street address.....

b 1 City, State and Zip Code, or.....

2 Foreign country.....

4 Principal business/profession.....

5 Employer ID number.....

6 Business code (Preparer Use Only)

7 Was this business fully disposed of in a fully taxable transaction during 2020? Yes No

8 Accounting method:
 Cash Accrual Other (specify)

9 Method used to value closing inventory:
 Cost Lower of cost or market Other (explain)

10 Was there a change in determining quantities, costs, or valuations between opening/closing inventory? (If yes, attach explanation) Yes No

11 Did you materially participate in the operation of this business during 2020? Yes No

12 Did you start or acquire this business during 2020? Yes No

13 a Did you make any payments in 2020 that require you to file Forms 1099? Yes No

b If yes, did you or will you file all the required Forms 1099? Yes No

14 At-risk determination:

a Is all of the investment in this activity at risk? Yes No

b Is some of the investment in this activity not at risk? Yes No

15 Did you have unallowed passive losses in 2019? Yes No

16 a Treat all MACRS assets for this activity as qualified Indian reservation property? Yes No

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? Regular Extension No

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? Yes No

d Was this business located in a Qualified Disaster Area? Yes No

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2020	2019
17 Gross receipts or sales.....		
18 Returns and allowances plus other adjustments.....		
19 Other income (include federal/state gas tax credit/refund)		

COST OF GOODS SOLD – IF APPLICABLE	2020	2019
20 Inventory at beginning of year		
21 Purchases		
22 Items withdrawn for personal use		
23 Cost of labor (do not include your salary)		
24 Materials and supplies		
25 Other costs		
26 Inventory at end of year.....		

Business Income and Expenses (continued)

ORG19

EXPENSES	2020	2019
Business name _____		
27 Advertising		
28 Car and truck expenses (complete ORG18).....		
29 Commissions and fees.....		
30 Contract labor		
31 Depletion		
32 Depreciation and Section 179 deduction (Preparer Use Only).....		
33 Employee benefit programs:		
a Employee health insurance premiums		
b Other employee benefit programs		
34 Insurance (other than health)		
35 Self-employed health insurance attributable to this business.....		
36 Interest:		
a Mortgage paid to banks not reported to you on Form 1098.....		
b Other		
37 Legal and professional services		
38 Office expenses		
39 Pension and profit-sharing plans.....		
40 Rent or lease:		
a Machinery and equipment (enter vehicle lease on ORG18)		
b Other business property.....		
41 Repairs and maintenance		
42 Supplies (not included in cost of goods sold)		
43 Taxes and licenses not reported to you on Form 1098.....		
44 Travel and meals		
a Travel.....		
b Meals subject to 50% limit.....		
c Meals subject to 80% limit.....		
d Meals not subject to limit		
45 Utilities		
46 Gross wages		
47 Other expenses:		

48 Expenses for business use of your home (Preparer Use Only).....		
Complete ORG20 for Business Use of Home.		
49 Qualified pension plan start-up costs		
50 DPAD (line 6) from cooperative(s) with tax year beginning before Jan. 1, 2018.....		
51 DPAD (line 6) from cooperative(s) with tax year beginning after Dec. 31, 2017		

ORG19

Business Use of Home

ORG20

for:
copy:

Simplified method election for Home Office expenses: Elect the simplified method **in 2020** instead of entering actual expenses
 Elected the simplified method **in 2019** instead of entering actual expenses

GENERAL INFORMATION		2020	2019
1	Area used regularly and exclusively for business, regularly and exclusively for day care, or regularly for inventory storage (square footage)		
2	Area used only partly for day care (square footage)		
3	Total area of home (square footage)		
4	Daycare hours		
a	Number of weeks used for day care, if less than full year		
b	Number of days used for day care each week		
c	Number of days closed for holidays, vacations, etc		
d	Number of hours used for day care each day		
e	Total hours used for day care		
f	Total hours available for use		
5	Enter the date you began using this home office for this business		
6	If part of your income is from a place of business other than this home, enter % of gross income from business use of this home		
7	Adjustment to gain from business use of home shown on Schedule D or Form 4797 (Preparer Use Only)		
8	Adjustment to losses from this business shown on Schedule D or Form 4797 (Preparer Use Only)		

Enter expenses that benefit only your business area in the 'Direct' column and expenses that benefit your entire home in the 'Indirect' column.

EXPENSES	2020		2019	
	Direct	Indirect	Direct	Indirect
9	Casualty losses (Preparer Use Only)			
10	Total mortgage interest/points			
11	Mortgage interest/points on Form 1098			
12	Interest not on Form 1098			
13	Points not of Form 1098			
14	Real estate taxes			
15	Excess mortgage interest (Preparer Use)			
16	Excess real estate taxes (Preparer Use)			
17	Qualified mortgage insurance			
18	Other insurance			
19	Rent			
20	Repairs and maintenance			
21	Utilities			
22	Other expenses (e.g., rent)			
23	Carryover of operating expenses			
24	Excess casualty losses (Preparer Use Only)			
25	Depreciation of your home (Preparer Use Only)			
26	Carryover of excess casualty losses and depreciation			

DEPRECIATION

If your home and any additions or improvements to your home are not already listed on ORG50 for this business, please complete the following information.

26	Description	Date Acquired (MM/DD/YY)	Date Placed in Service (MM/DD/YY)	Cost (include land for residence only)
	Residence			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
27	Enter the land value included in cost for residence			

Sales of Stocks and Securities Basic Info

ORG21

Name	Social Security Number
------	------------------------

	Yes	No
1 Did you exchange any securities for other securities or any other property held for investment?	<input type="checkbox"/>	<input type="checkbox"/>
2 Did you acquire stock identical to stock sold at a loss within a period beginning 30 days prior to and ending 30 days after the date of the sale?	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you engage in any transactions involving traded options?	<input type="checkbox"/>	<input type="checkbox"/>
4 Did you engage in any transactions involving commodity future contracts and straddle positions?	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you engage in any transactions involving <i>employee</i> stock options?	<input type="checkbox"/>	<input type="checkbox"/>
6 Schedule D included in the 2019 Federal income tax return?	<input type="checkbox"/>	<input type="checkbox"/>

Enter details of specific security sales on Sales of Stocks and Securities (ORG21A)
 Use Installment Sales Income (ORG23) to report installment sales.

Sales of Stocks and Securities

ORG21A

Name _____	Social Security Number _____
------------	------------------------------

Name of reporting financial institution ▶ _____
Acct Number ▶ _____ **Reporter's Tax ID** . . . ▶ _____
Owner of account ▶ _____
Transactions were not reported to IRS . ▶

Quick Entry Table

The following adjustment codes may be entered in the table below if applicable: B, C, E, M, O, T, and W. (If the only adjustment is a disallowed wash sale (W), use the Disallowed Wash Sale field. Otherwise, use only the Adjustment Amount & Adjustment Code fields.)

Sale#	Property Description							
8949 Box	Date Sold	Date Acquired	Sales Price (Proceeds)	Cost or Other Basis		Disallowed Wash Sale		
Adjustment Amount*	Adjustment Code(s)*	Holding Period	Basis Reported to IRS?		Reported on Form 1099B?			
			Yes		No	Yes		No
			Yes		No	Yes		No
			Yes		No	Yes		No
			Yes		No	Yes		No

Note: For Sales Price, Cost Basis, or Adjustment Amount of \$10,000,000 or more, leave those fields blank and use the **Capital Gain (Loss) Adjustment Worksheet** after transferring. Additional adjustments and withholding are also supported on the **Capital Gain (Loss) Adjustment Worksheet**.

Sales of Stocks and Securities

ORG21A

Name _____	Social Security Number _____
------------	------------------------------

Name of reporting financial institution ▶ _____
Acct Number ▶ _____ **Reporter's Tax ID** . . . ▶ _____
Owner of account ▶ _____
Transactions were not reported to IRS . ▶

Quick Entry Table

The following adjustment codes may be entered in the table below if applicable: B, C, E, M, O, T, and W. (If the only adjustment is a disallowed wash sale loss (W), use the Disallowed Wash Sale field. Otherwise, use only the Adjustment Amount & Adjustment Code fields.)

Sale#	Property Description		Sales Price (Proceeds)		Cost or Other Basis		Disallowed Wash Sale	
8949 Box	Date Sold	Date Acquired	Yes		No		Yes	
Adjustment Amount*	Adjustment Code(s)*	Holding Period	Basis Reported to IRS?		Reported on Form 1099B?			
			Yes		No		Yes	
			Yes		No		Yes	
			Yes		No		Yes	
			Yes		No		Yes	

Note: For Sales Price, Cost Basis, or Adjustment Amount of \$10,000,000 or more, leave those fields blank and use the **Capital Gain (Loss) Adjustment Worksheet** after transferring. Additional adjustments and withholding are also supported on the **Capital Gain (Loss) Adjustment Worksheet**.

Sale of Your Home

ORG22

GENERAL INFORMATION

Attach copies of your original purchase and the current sale settlement sheets here.

Complete if the sale of your home occurred in the current year (2020).

- | | Yes | No |
|---|--------------------------|--------------------------|
| 1 a Was the sale amount of your residence \$250,000 or less (\$500,000 or less if married filing a joint return)? | <input type="checkbox"/> | <input type="checkbox"/> |
| b Did you acquire this home in a like-kind (Section 1031) exchange and sell it within 5 years of acquiring it? | <input type="checkbox"/> | <input type="checkbox"/> |
| c Did you use this home partially or completely in a trade or business or hold it for investment AND dispose of it in a like-kind (Section 1031) exchange? | <input type="checkbox"/> | <input type="checkbox"/> |
| d Did you claim the First-Time Homebuyer Credit when you purchased this home? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 a Did you live in your home as a principal residence for a total of at least 2 years during the 5-year period ending on the date of sale? | <input type="checkbox"/> | <input type="checkbox"/> |
| b If married filing a joint return, did your spouse live in your home as a principal residence for a total of at least 2 years during the 5-year period ending on the date of sale? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 Did you receive a Form 1099-S? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 a Have you sold and excluded gain from another principal residence within 2 years before the sale of this home? | <input type="checkbox"/> | <input type="checkbox"/> |
| b If married filing a joint return, has your spouse sold and excluded gain from another principal residence within 2 years before the sale of this home? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 Did you sell this home due to a change of health, place of employment or other unforeseen circumstances? (If this is a joint sale, answer both questions the same. Otherwise, answer as applicable.) | | |
| a You | <input type="checkbox"/> | <input type="checkbox"/> |
| b Your spouse | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 a Did you or your spouse use any part of your residence for business or rental purposes after May 6, 1997? | <input type="checkbox"/> | <input type="checkbox"/> |
| b Was the home used as investment or rental property after December 31, 2008? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 a Will you be receiving periodic payments of principal or interest from this sale? | <input type="checkbox"/> | <input type="checkbox"/> |
| b If Yes , what is the amount of the financial instrument? | | |

8 Address of former home sold

9 a Date former home was sold

b Date former home was bought

10 Sales price of the home sold

COST BASIS OF HOME SOLD

Description	Amount
Original cost of home sold:	
11 a Purchase price of home sold	
b Postponed gain on the sale of your previous home sold before May 7, 1997 (Form 2219 for the year this home was bought)	
Additions and increases to basis:	
12 a Settlement fees or closing costs when home was purchased. Do not include amounts previously deducted as moving expenses	
b Cost of capital improvements	
c Additions, including costs of materials and labor	
d Other additions and increases to basis	
Decreases to basis:	
13 a Seller-paid points (for old home bought after 1990)	
b Other decreases to basis	

COMMISSIONS AND OTHER EXPENSES OF SALE

Description	Amount
14 a	
b	
c	
d	

Installment Sale Income

ORG23

Attach all closing documents if this is the year of sale.

Was the property sold in this installment sale a rental or used in a trade or business?
Was the final installment received this year?

1 Description of property
2a Date acquired 2b Date sold
c Check this box if ordinary gain from non-capital asset.

GROSS PROFIT INFORMATION
(Complete for year of sale only.)

3 Selling price, including mortgages and other debts
4 Mortgages and other debts buyer assumed or took property subject to
5 Cost or other basis of property sold
6 Depreciation allowed or allowable
7 Commissions and other expenses of sale
8 Was this property your main home?

CURRENT TAXABLE PORTION

9 Gross profit percentage
10a Payments received in current year
b Interest received in current year

Seller Financed Mortgage Information

11 Payer's Name
Address
City State ZIP code
Country SSN or EIN

12 Payments received in prior years (do not include interest)

SALES TO RELATED PARTIES

13a Was the property sold to a related party after May 14, 1980?
b If yes, was the property a marketable security?
If yes, complete the rest of this form. If no, complete for year of sale and for 2 years after the sale.
If you received the final installment payment this year, do not complete the rest of this form.

c Give the name, address, and taxpayer identification number of related party:
Name
Address
City State ZIP code
Identifying number

14 Did the related party, during this tax year, resell or dispose of the property?
If no, do not complete the rest of this form.

Answer yes to no more than one of the following questions.

15a Was the second disposition more than two years after the first disposition (other than dispositions of marketable securities)?
b Was the first disposition a sale or exchange of stock to the issuing corporation?
c Was the second disposition an involuntary conversion where the threat of conversion occurred after the first disposition?
d Did the second disposition occur after the death of the original seller or buyer?
e Can it be established to the satisfaction of the IRS that tax avoidance was not a principal purpose for either disposition?

If yes, give explanation

16 If you answered no to all questions 15a through 15e, enter sales price of the property sold by related party (attach Form 6252 for year of first sale)

Rent and Royalty Income and Expenses

ORG25

BASIC PROPERTY INFORMATION

Property description: _____
 Property type: * _____ If type is other, enter a description: _____
 Location (street address): _____
 City: _____ State: _____ Zip: _____
 If a foreign address: Foreign province or state: _____
 Foreign postal code: _____ Foreign Country: _____

Is this activity a qualified trade or business under Section 199A? Yes No

1 Check property owner **Taxpayer** **Spouse** **Joint** **Yes** **No**

2 a Did you make any payments that would require you to file Form(s) 1099? **Yes** **No**

b If **yes**, did you or will you file all required Forms(s) 1099? **Yes** **No**

3 a Enter the ownership percentage (if not 100%) _____

b If not 100%, are you reporting 100% of the income and expenses? **Yes** **No**

4 Is this a rental property? (If **yes**, answer questions 5 through 11; if **no**, skip to question 12.) **Yes** **No**

5 Did you have personal use of this property or rent it for part of the year at less than fair rental value? **Yes** **No**

6 For all rental properties, **enter the number of days** during 2020 that:

a The property was rented at fair rental value _____

b The property was used personally or rented at less than fair rental value _____

c You owned the property, if not the entire year _____

7 a Does this rental have multiple living units and you live in one of the units? **Yes** **No**

b If **yes**, enter percentage of rental use _____

8 Did you actively participate in this property's management during 2020 ? **Yes** **No**

9 Did you materially participate in this property's management during 2020 ? **Yes** **No**

10 Do you want to treat this property as non-passive? **Yes** **No**

11 Did this property have unallowed passive losses in 2019 ? **Yes** **No**

12 Did you dispose of this property in a fully taxable transaction? **Yes** **No**

13 Check this box if some of this investment was **not** at-risk **Yes** **No**

14 a Treat all MACRS assets for this activity as qualified Indian reservation property? **Yes** **No**

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? **Regular** **Extension** **No**

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? **Yes** **No**

d Was this activity located in a Qualified Disaster Area? **Yes** **No**

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2020	2019
15 Rents or royalties received		

- | | |
|--|--|
| <p>* Property Types:</p> <p>1 Single family residence</p> <p>2 Multi-family residence</p> <p>3 Vacation/short-term rental</p> <p>4 Commercial</p> | <p>5 Land</p> <p>6 Royalties</p> <p>7 Self-rental</p> <p>8 Other</p> |
|--|--|

Rent and Royalty Income and Expenses (continued)

ORG25

EXPENSES	2020	2019
Property location		
16 Advertising		
17 a Automobile (complete ORG18 for autos).....		
b Travel.....		
18 Cleaning and maintenance		
19 Commissions.....		
20 a Mortgage insurance premiums – qualified		
b Other insurance		
21 Legal and professional fees		
22 Management fees		
23 a Mortgage interest paid to banks – qualified.....		
b Mortgage interest paid to banks – other		
24 Other interest		
25 Repairs.....		
26 Supplies.....		
27 a Real estate taxes.....		
b Other taxes.....		
28 Utilities		
29 Other expenses:		
a		
b		
c		
d		
e		
30 a Depreciation and Section 179 deduction (Preparer Use Only).....		
b Depletion (Preparer Use Only).....		

Farm Rental Income and Expenses

ORG26

GENERAL INFORMATION

Name of this activity

Is this activity a qualified trade or business under Section 199A? Yes No

1 Check ownership **Taxpayer** **Spouse** **Joint**

2 Employer identification number.....

3 Was this farm fully disposed of in a fully taxable transaction during 2020? **Yes** **No**

4 Did you actively participate in the operation of this business during 2020? **Yes** **No**

5 Real estate professionals:
Did you materially participate in the operation of this business during 2020? **Yes** **No**

6 At-risk determination:

a Is all of the investment in this activity at risk? **Yes** **No**

b Is some of the investment in this activity not at risk? **Yes** **No**

c Did you receive a subsidy in 2020? **Yes** **No**

7 Did you have unallowed passive losses in 2019? **Yes** **No**

8 a Treat all MACRS assets for this activity as qualified Indian reservation property? **Yes** **No**

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property?..... **Regular** **Extension** **No**

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? **Yes** **No**

d Was this farm rental located in a Qualified Disaster Area? **Yes** **No**

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

FARM RENTAL INCOME – BASED ON PRODUCTION	2020	2019
9 Income from production of livestock, produce, grains and crops		
10 Total distributions received from cooperatives		
11 Taxable amount of distributions from cooperatives		
12 Total agricultural program payments		
13 Taxable amount of agricultural program payments		
14 Commodity Credit Corporation (CCC) loans under election		
15 CCC loans forfeited/repaid with certificates		
16 Taxable amount of CCC loans forfeited/repaid.....		
17 Crop insurance proceeds/federal crop disaster payments received in 2020		
18 Taxable crop insurance proceeds/federal crop disaster payments		
19 Crop insurance proceeds/federal crop disaster deferred from 2019		
20 Other income – include federal/state gas tax credit/refund		

Farm Rental Income and Expenses (continued)

ORG26

EXPENSES – FARM RENTAL PROPERTY		2020	2019
Name of this activity			
21	Car and truck expense (complete ORG18)		
22	Chemicals		
23	Conservation expenses		
24	Custom hire (machine work)		
25	Depreciation and Section 179 deduction (Preparer Use Only)		
26	Employee benefit programs other than pension and profit-sharing plans.....		
27	Feed		
28	Fertilizers and lime.....		
29	Freight and trucking.....		
30	Gasoline, fuel, and oil		
31	Insurance (other than health)		
32	Interest:		
	a Mortgage (paid to banks, etc).....		
	b Other		
33	Labor hired		
34	Pension and profit-sharing plans		
35	Rent or lease:		
	a Machinery, equipment, etc (for vehicle rent or lease, see ORG18)		
	b Other (land, animals, etc)		
36	Repairs and maintenance		
37	Seeds and plants.....		
38	Storage and warehousing.....		
39	Supplies.....		
40	Taxes		
41	Utilities		
42	Veterinary fees and medicine		
43	Other expenses (specify):		

44	Qualified pension plan start-up costs.....		
45	DPAD (line 6) from cooperative(s) with tax year beginning before Jan. 1, 2018		
46	DPAD (line 6) from cooperative(s) with tax year beginning after Dec. 31, 2017.....		

Farm Income and Expenses

ORG27

GENERAL INFORMATION

Name of this farm

Is this activity a qualified trade or business under Section 199A? Yes No

1 Check ownership Taxpayer Spouse Joint

2 Principal product

3 Employer identification number

4 Agricultural activity code (Preparer Use Only)

5 Accounting method Cash Accrual

	Yes	No
6 Was this farm fully disposed of in a fully taxable transaction during 2020?	<input type="checkbox"/>	<input type="checkbox"/>
7 Did you materially participate in the operation of this business during 2020?	<input type="checkbox"/>	<input type="checkbox"/>
8 Did you make any payments in 2020 that would require you to file Form(s) 1099	<input type="checkbox"/>	<input type="checkbox"/>
9 If 'Yes,' did you or will you file all required Forms 1099?	<input type="checkbox"/>	<input type="checkbox"/>
10 At-risk determination:		
a Is all of the investment in this activity at risk?	<input type="checkbox"/>	
b Is some of the investment in this activity not at risk?	<input type="checkbox"/>	<input type="checkbox"/>
c Did you receive a subsidy in 2020?	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you have unallowed passive losses in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
12a Treat all MACRS assets for this activity as qualified Indian reservation property?		
b Treat all assets acquired after August 27, 2005 as qualified GO Zone property?	Regular <input type="checkbox"/>	Extension <input type="checkbox"/> No <input type="checkbox"/>
c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?	<input type="checkbox"/>	<input type="checkbox"/>
d Was this farm located in a Qualified Disaster Area?	<input type="checkbox"/>	<input type="checkbox"/>

FARM INCOME – CASH METHOD	2020	2019
13 Sales of livestock, etc purchased for resale		
14 Cost/Basis of livestock, etc purchased for resale		
15 Sales of livestock, produce, grains, etc raised		
16a Total distributions received from cooperatives		
b Taxable amount of distributions from cooperatives		
17a Total agricultural program payments		
b Taxable amount of agricultural program payments		
c If you received social security retirement or disability benefits, enter any Conservation Reserve Program payments included on line 15		
18a Commodity Credit Corporation (CCC) loans under election		
b CCC loans forfeited/repaid with certificates		
c Taxable amount of CCC loans forfeited/repaid		
19a Crop insurance proceeds/federal crop disaster payments received in 2020		
b Taxable crop insurance proceeds/federal crop disaster payments		
c Crop insurance proceeds/federal crop disaster payments deferred from 2019		
20 Custom hire (machine work) income		
21 Other income – include federal/state gas tax credit/refund		

FARM INCOME – ACCRUAL METHOD	2020	2019
22 Sales – livestock, produce, grain, other products		
23a Total distributions received from cooperatives		
b Taxable amount of distributions from cooperatives		
24a Total agricultural program payments		
b Taxable amount of agricultural program payments		
25a Commodity Credit Corporation (CCC) loans under election		
b CCC loans forfeited/repaid with certificates		
c Taxable amount of CCC loans forfeited/repaid		
26 Crop insurance proceeds and certain disaster payments		
27 Custom hire (machine work) income		
28 Other income include federal/state gas tax credit/refund		

Farm Income and Expenses (continued)

ORG27

FARM INCOME – ACCRUAL METHOD (continued)		2020	2019
29	Cost of Goods Sold:		
a	Beginning inventory – livestock, produce, etc		
b	Cost of livestock, produce, etc purchased		
c	Ending inventory – livestock, produce, etc		
30	Check if you used the unit-livestock price method or farm-price method to value inventory.....	<input type="checkbox"/>	<input type="checkbox"/>
Complete ORG51 for acquisitions and ORG50 for dispositions.			

FARM EXPENSES – CASH AND ACCRUAL METHODS		2020	2019
	Name of this farm		
31	Car and truck expense (complete ORG18)		
32	Chemicals		
33	Conservation expenses		
34	Custom hire (machine work)		
35	Depreciation and Section 179 deduction (Preparer Use Only)		
36	Employee benefit programs other than pension and profit-sharing plans.....		
37	Feed		
38	Fertilizers and lime.....		
39	Freight and trucking.....		
40	Gasoline, fuel and oil.....		
41 a	Insurance (other than health)		
b	Self-employed health insurance attributable to this farm business.....		
42	Interest:		
a	Mortgage (paid to banks, etc).....		
b	Other		
43	Labor hired		
44	Pension and profit-sharing plans.....		
45	Rent or lease:		
a	Machinery, equipment, etc (for vehicle rent or lease, see ORG18)		
b	Other (land, animals, etc)		
46	Repairs and maintenance		
47	Seeds and plants purchased		
48	Storage and warehousing.....		
49	Supplies purchased		
50	Taxes.....		
51	Utilities		
52	Veterinary, breeding and medicine.....		
53	Other expenses (specify):		

54	Qualified pension plan start-up costs.....		
55	DPAD (line 6) from cooperative(s) with tax year beginning before Jan. 1, 2018		
56	DPAD (line 6) from cooperative(s) with tax year beginning after Dec. 31, 2017.....		

Adjustments to Income

ORG28

TRADITIONAL IRA CONTRIBUTIONS	Taxpayer	Spouse
1 Traditional IRA contributions made for 2020		
2 Check if you were covered by a retirement plan at work.....	<input type="checkbox"/>	<input type="checkbox"/>
3 Check if you wish to make an additional contribution to your traditional IRA before the due date of your return.....	<input type="checkbox"/>	<input type="checkbox"/>
4 If line 3 is checked, check this box to contribute the maximum allowable amount.....	<input type="checkbox"/>	<input type="checkbox"/>
5 Or enter the amount you wish to contribute		
If you (a) received traditional IRA distributions during 2020 and you have made nondeductible IRA contributions to any of your traditional IRAs, including SIMPLE IRAs, OR (b) choose to make any nondeductible traditional IRA contributions for 2020, please provide this information:		
6 Enter the value of all of your IRAs on 12/31/2020		
7 Enter the value of all recharacterizations after 12/31/2020		
8 Enter the amount of any outstanding rollovers as of 1/1/2021		
If you received IRA distributions during 2020, please complete ORG7.		

ROTH IRA CONTRIBUTIONS	Taxpayer	Spouse
1 Roth IRA contributions made for 2020		
2 Check if you wish to make an additional contribution to your Roth IRA before the due date of your return.....	<input type="checkbox"/>	<input type="checkbox"/>
3 If line 2 is checked, check this box to contribute the maximum allowable amount.....	<input type="checkbox"/>	<input type="checkbox"/>
4 Or enter the amount you wish to contribute		

SELF-EMPLOYED PENSION CONTRIBUTIONS	Taxpayer	Spouse
Money Purchase Plan Keogh and Multiple Plans:		
1 a Payments made and/or expected to be made to a money purchase Keogh plan for 2020		
b Check this box if you wish to contribute the maximum amount to your money purchase Keogh for 2020	<input type="checkbox"/>	<input type="checkbox"/>
Profit Sharing Plan Keogh:		
2 a Payments made and/or expected to be made to a profit sharing Keogh for 2020		
b Check this box if you wish to contribute the maximum amount to your profit sharing Keogh for 2020	<input type="checkbox"/>	<input type="checkbox"/>
Defined Benefit Plan Keogh:		
3 Payments made and/or expected to be made to a defined benefit Keogh plan for 2020		
SEP:		
4 a Payments made and/or expected to be made to a SEP for 2020		
b Check this box if you wish to contribute the maximum amount to your SEP for 2020	<input type="checkbox"/>	<input type="checkbox"/>
Self-Employed SIMPLE Plan:		
5 a Payments made and/or expected to be made to a self-employed SIMPLE plan for 2020		
b Enter matching contributions only to report on Form 1040 to a self-employed SIMPLE plan for 2020		
Individual 401(k):		
6 a Elective deferrals made and/or expected to be made to an Individual 401(k) plan for 2020		
b Catch-up contributions made and/or expected to be made to an Individual 401(k) for 2020		
c Employer matching profit-sharing contribution made and/or expected to be made to an Individual 401(k) plan for 2020.....		
d Check this box if you wish to contribute the maximum amount to your Individual 401(k) for 2020	<input type="checkbox"/>	<input type="checkbox"/>
Roth 401(k):		
7 a Elective deferrals made or expected to be made to a designated Roth 401(k) plan for 2020		
b Catch-up contributions made or expected to be made to a designated Roth 401(k) plan for 2020		

ALIMONY PAID		
Recipient's name	Recipient's SSN	Alimony paid
1		
2		

Child and Dependent Care Expenses

ORG35

CHILD AND DEPENDENT CARE EXPENSES			
Enter below the persons or organizations who provided the child and dependent care.			
First Name (if person) Last Name (if person) OR Provider Business Name Additional Business Name	Provider Address	ID Number SSN on first line OR EIN on second line	Amount Paid
Provider Phone			
1 Care at above address?..... <input type="checkbox"/> Tax-Exempt .. ▶ <input type="checkbox"/> Foreign ▶ <input type="checkbox"/>
2 Care at above address?..... <input type="checkbox"/> Tax-Exempt .. ▶ <input type="checkbox"/> Foreign ▶ <input type="checkbox"/>
3 Care at above address?..... <input type="checkbox"/> Tax-Exempt .. ▶ <input type="checkbox"/> Foreign ▶ <input type="checkbox"/>
4 Care at above address?..... <input type="checkbox"/> Tax-Exempt .. ▶ <input type="checkbox"/> Foreign ▶ <input type="checkbox"/>
EXPENSES		2020	2019
1	Total employment taxes paid on wages for child care expenses		
2	Total expenses paid in 2020 but not incurred in 2020		
3	Total expenses incurred in 2020 but not paid in 2020		
4	Medical expenses paid for qualifying persons unable to care for themselves		
STUDENT/DISABLED PERSON INFORMATION FOR 2020		Taxpayer	Spouse
5 If taxpayer or spouse was a full-time student or disabled in 2020, answer the following questions:			
a Number of months that taxpayer/spouse was a full-time student or disabled			
b Did taxpayer or spouse work and earn less than \$250/\$500 during the months entered on line 5a? If No, leave line 5b blank. If Yes, multiply the number of months working and earning less by either \$250/\$500 and enter that amount here			

Education Information

ORG36

EDUCATION TUITION AND FEES

Attach all Form 1098-Ts and a list of your qualified expenses.

EDUCATOR EXPENSES	2020	2019
1 a Taxpayer educator expenses.....		
b Spouse educator expenses.....		

STUDENT LOAN INTEREST PAID

Student Loan Interest Reported on a 1098-E in 2020

2 a Enter detail below or total interest in Part 2b

Lender's Name	2020	2019
Total Student Loan Interest	2020	2019
2 b Enter the total interest paid on qualified student loans.....		

FORM 1099-Q

3 Enter 1099-Q detail below.

State Code	Name of Payer or Program	Gross Distribution Box 1	Earnings Box 2	* Type Box 5

* For the Type Code, enter the following:
 P = Private Qualified Tuition Program
 S = State Qualified Tuition Program
 E = Coverdell ESA

Tax Payments

ORG40

2020 ESTIMATED TAX PAYMENTS

	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
1 Qtr 1 due by 07/15/20.....								
2 Qtr 2 due by 07/15/20.....								
3 Qtr 3 due by 09/15/20.....								
4 Qtr 4 due by 01/15/21								
5 a Additional payments...								
b Additional payments...								
c Additional payments...								
d Additional payments...								

OTHER TAX PAYMENTS

	Federal	State	Local
6 2019 overpayment applied to 2020			
7 Balance due paid with 2019 return			
8 a 2019 Quarter 4 payments paid in 2020			
b 2019 extension payments paid in 2020			
9 Other taxes paid in 2020 for prior years (include explanation)			

2021 ESTIMATED TAX WORKSHEET

If you expect any significant change in your income or expenses in 2021, please enter the increase or decrease below.

Income

10 Wages	Taxpayer	_____
	Spouse.....	_____
11 Self-Employment Income	Taxpayer	_____
	Spouse.....	_____
12 Capital Gains (sale of stock, real estate, etc)		_____
13 Other Income:		
Description		_____

Deductions

14 Allowable Itemized Deductions	_____
15 Other deductions (such as alimony paid, early withdrawal penalties, etc):	
Description	_____
16 Federal Withholding	_____
17 Number of personal exemptions expected for 2021	_____

ADDITIONAL INFORMATION

18 Check to use your 2020 tax amount for your 2021 estimate.....	<input type="checkbox"/>
19 If you have an overpayment of 2020 taxes, check the box to indicate how you want your overpayment applied.	
a Apply entire overpayment to next year and refund excess	<input type="checkbox"/>
b Apply entire overpayment to first quarter and refund excess	<input type="checkbox"/>
20 Amount to apply if not entire overpayment.....	_____
21 Number of installments for estimated tax (1 - 4)	_____

Household Employment Taxes

ORG41

GENERAL INFORMATION

Attach copies of your state payroll returns and other payroll forms.

- 1 Enter your employer identification number Yes No
- 2 Did you pay **any one** household employee cash wages of \$2,200 or more in 2020 ?
- 3 Did you withhold federal income tax during 2020 for any household employee?
- 4 Did you pay total cash wages of \$1,000 or more **in any calendar quarter** of 2019 or 2020 to **all** household employees?

COMPLETE IF YOU ANSWERED 'YES' TO QUESTION 2 OR 3 ABOVE

2020

2019

- 5 Enter total cash wages paid during 2020 that were:
- a Subject to social security taxes
- b Subject to Medicare taxes.....
- c Subject to FUTA taxes.....
- 6 Enter federal income tax withheld during 2020

COMPLETE IF YOU ANSWERED 'YES' TO QUESTION 4 ABOVE

Federal Unemployment Tax (FUTA) Questions:

Yes No

- 7 Did you pay unemployment contributions to only one state?
- 8 Did you pay all state unemployment contributions for 2020 by April 15, 2021 ?
- 9 Were all wages that are taxable for FUTA tax also taxable for your state's unemployment tax?
- 10 Enter any unemployment compensation you paid for :

State Name	State Reporting Number	Taxable Wages		Contributions Paid to State Unemployment Fund	
		2020	2019	2020	2019
a	---				
b	---				

11 Complete the following if you know your state experience rate:

- a State experience rate (e.g., enter 5.5 for 5.5%)
- b State experience rate period – starting date (e.g., 01/01/2020)
- c State experience rate period – ending date (e.g., 12/31/2020)

State A	State B
_____	_____

K-1 Partnership – Partner's Questions

ORG45

<input checked="" type="checkbox"/>	Attach all copies of K-1s from partnerships.	
1	Name of partnership _____ Partnership identification number _____ Tax shelter registration number _____ 1 Ownership <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this partnership? <input type="checkbox"/> Yes <input type="checkbox"/> No	
2	Name of partnership _____ Partnership identification number _____ Tax shelter registration number _____ 1 Ownership <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this partnership? <input type="checkbox"/> Yes <input type="checkbox"/> No	
3	Name of partnership _____ Partnership identification number _____ Tax shelter registration number _____ 1 Ownership <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this partnership? <input type="checkbox"/> Yes <input type="checkbox"/> No	
4	Name of partnership _____ Partnership identification number _____ Tax shelter registration number _____ 1 Ownership <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this partnership? <input type="checkbox"/> Yes <input type="checkbox"/> No	
5	Name of partnership _____ Partnership identification number _____ Tax shelter registration number _____ 1 Ownership <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this partnership? <input type="checkbox"/> Yes <input type="checkbox"/> No	
6	Name of partnership _____ Partnership identification number _____ Tax shelter registration number _____ 1 Ownership <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint 2 Is this the final K-1 for this partnership? <input type="checkbox"/> Yes <input type="checkbox"/> No	

K-1 Partner's Share of Income, Credits, Deductions, Etc

ORG45A

Name of Partnership	Partnership ID	Tax Shelter Reg No.
---------------------	----------------	---------------------

Is this activity a qualified trade or business under Section 199A? Yes No

Ownership Taxpayer Spouse Joint Yes No

Is this the final K-1 for this Partnership?

GENERAL QUESTIONS

	Yes	No
1 Was all of the investment in this activity at-risk ?	<input type="checkbox"/>	<input type="checkbox"/>
2 Trade or business activities (Schedule K-1, line 1):		
a Did you materially participate in this activity during 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
3 Rental real estate activities (Schedule K-1, line 2):		
a Did you materially participate in this activity during 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
b Did you actively participate in this activity during 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
4 Are there suspended passive losses carried over from 2019?	<input type="checkbox"/>	<input type="checkbox"/>
5 Is this a publicly traded partnership?	<input type="checkbox"/>	<input type="checkbox"/>
6 Is this a foreign partnership?	<input type="checkbox"/>	<input type="checkbox"/>
7 Are you a general partner (or managing member, if limited liability company)?	<input type="checkbox"/>	<input type="checkbox"/>
8 Enter health insurance paid by you personally and related to this activity.....		

K-1 LINE ITEMS

1 Ordinary business income (loss)	
2 Net rental real estate income (loss)	
3 Other net rental income (loss)	
4 Guaranteed payments	
5 Interest income	
a Income from U.S. Bonds (nontaxable to states) included in line 5.....	
6 a Ordinary dividends	
b Qualified dividends.....	
8 Net short-term capital gain (loss)	
9 a Net long-term capital gain (loss)	
b Collectibles (28%) gain (loss)	
c Unrecaptured Section 1250 gain	
10 Net Section 1231 gain (loss)	
12 Section 179 expense deduction.....	

Domestic Production Activity Deduction from Form 1099-PATR

DPAD (line 6) from cooperative(s) with tax year beginning before Jan. 1, 2018.....	
DPAD (line 6) from cooperative(s) with tax year beginning after Dec. 31, 2017	

K-1 S Corporation – Shareholder's Questions

ORG46

<input checked="" type="checkbox"/>	Attach all copies of K-1s from S Corporations.	
1	Name of S Corporation	_____
	S Corporation identification number _____	Tax shelter registration number ... _____
	1 Ownership	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this S Corporation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2	Name of S Corporation	_____
	S Corporation identification number _____	Tax shelter registration number ... _____
	1 Ownership	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this S Corporation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	Name of S Corporation	_____
	S Corporation identification number _____	Tax shelter registration number ... _____
	1 Ownership	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this S Corporation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	Name of S Corporation	_____
	S Corporation identification number _____	Tax shelter registration number ... _____
	1 Ownership	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this S Corporation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5	Name of S Corporation	_____
	S Corporation identification number _____	Tax shelter registration number ... _____
	1 Ownership	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this S Corporation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6	Name of S Corporation	_____
	S Corporation identification number _____	Tax shelter registration number ... _____
	1 Ownership	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this S Corporation?	<input type="checkbox"/> Yes <input type="checkbox"/> No

K-1 Shareholder's Share of Income, Credits, Deductions, Etc

ORG46A

Name of S Corporation	S Corporation ID	Tax Shelter Reg No.
-----------------------------	------------------------	--------------------------

Is this activity a qualified trade or business under Section 199A? Yes No

Ownership Taxpayer Spouse Joint Yes No

Is this the final K-1 for this S Corporation?

GENERAL QUESTIONS

		Yes	No
1 Was all of the investment in this activity at-risk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Trade or business activities (Schedule K-1, line 1):			
a Did you materially participate in this activity during 2020?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Rental real estate activities (Schedule K-1, line 2):			
a Did you materially participate in this activity during 2020?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b Did you actively participate in this activity during 2020?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Are there suspended passive losses carried over from 2019?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 Enter health insurance paid by you personally and related to this activity.....			

K-1 LINE ITEMS

1 Ordinary business income (loss)	
2 Net rental real estate income (loss)	
3 Other net rental income (loss)	
4 Interest income	
a Income from U.S. Bonds (nontaxable to states) included in line 4	
5 a Ordinary dividends	
b Qualified dividends	
7 Net short-term capital gain (loss)	
8 a Net long-term capital gain (loss)	
b Collectibles (28%) gain (loss)	
c Unrecaptured section 1250 gain	
9 Net section 1231 gain (loss)	
10 Section 179 expense deduction	

Domestic Production Activity Deduction from Form 1099-PATR

DPAD (line 6) from cooperative(s) with tax year beginning before Jan. 1, 2018	
DPAD (line 6) from cooperative(s) with tax year beginning after Dec. 31, 2017	

K-1 Estate & Trust – Beneficiary's Questions

ORG47

<input checked="" type="checkbox"/>	Attach all copies of K-1's from estates and trusts.		
1	Name of estate or trust		
	Estate or trust identification no... ..		Tax shelter registration number
	1 Beneficiary	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust?		<input type="checkbox"/> Yes <input type="checkbox"/> No
2	Name of estate or trust		
	Estate or trust identification no... ..		Tax shelter registration number
	1 Beneficiary	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust?		<input type="checkbox"/> Yes <input type="checkbox"/> No
3	Name of estate or trust		
	Estate or trust identification no... ..		Tax shelter registration number
	1 Beneficiary	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust?		<input type="checkbox"/> Yes <input type="checkbox"/> No
4	Name of estate or trust		
	Estate or trust identification no... ..		Tax shelter registration number
	1 Beneficiary	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust?		<input type="checkbox"/> Yes <input type="checkbox"/> No
5	Name of estate or trust		
	Estate or trust identification no... ..		Tax shelter registration number
	1 Beneficiary	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust?		<input type="checkbox"/> Yes <input type="checkbox"/> No
6	Name of estate or trust		
	Estate or trust identification no... ..		Tax shelter registration number
	1 Beneficiary	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse <input type="checkbox"/> Joint
	2 Is this the final K-1 for this estate or trust?		<input type="checkbox"/> Yes <input type="checkbox"/> No

K-1 Beneficiary's Share of Income, Deductions, Credits, Etc

ORG47A

Name of Estate or Trust	Estate or Trust ID	Tax Shelter Reg No.
-------------------------	--------------------	---------------------

Is this activity a qualified trade or business under Section 199A? Yes No

Ownership Taxpayer Spouse Joint

Check one: Domestic Beneficiary Foreign Beneficiary Yes No

Is this the final K-1 for this Estate or Trust?

GENERAL QUESTIONS

		Yes	No
1 Rental real estate activities:			
a Is this a qualifying estate for material participation?		<input type="checkbox"/>	<input type="checkbox"/>
b Is this a qualifying estate for active participation?		<input type="checkbox"/>	<input type="checkbox"/>
2 Are there suspended passive losses carried over from 2019?		<input type="checkbox"/>	<input type="checkbox"/>

K-1 LINE ITEMS

For Schedule K-1 lines not shown below, enter amounts directly into ProSeries 1040.

1 a Interest	
b U.S. Bonds (nontaxable to states) included in line 1a	
2 a Total ordinary dividends	
b Qualified dividends	
3 Net short-term capital gain	
4 a Net long-term capital gain	
b 28% rate gain included in net long-term capital gain	
c Unrecaptured Section 1250 included in net long-term capital gain	

Domestic Production Activity Deduction from Form 1099-PATR

DPAD (line 6) from cooperative(s) with tax year beginning before Jan. 1, 2018	
DPAD (line 6) from cooperative(s) with tax year beginning after Dec. 31, 2017	

K-1 Supplemental Business Expenses

ORG48

Partnership		
EXPENSES	2020	2019
Use ORG18 to enter vehicle expenses.		
1 Vehicle expenses.....		
2 Vehicle rentals.....		
3 Travel expenses while away from home (excluding meals/entertainment expenses)		
4 Business gifts.....		
5 Education.....		
6 Office supplies and expenses.....		
7 Telephone, fax, pager, etc.....		
8 Trade publications.....		
9 Depreciation and amortization (Preparer Use Only)		
Use ORG50 to record dispositions. Use ORG51 to enter additional assets.		
Treat all MACRS assets for activity as qualified Indian reservation property?..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
Treat all assets acquired after August 27, 2005 as qualified GO Zone property?..... <input type="checkbox"/> Regular <input type="checkbox"/> Extension <input type="checkbox"/> No		
Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
Was this activity located in a Qualified Disaster Area?..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
10 Carryover of Section 179 expense from prior year.....		
11 Meals and entertainment expenses.....		
12 Other:		

REIMBURSEMENTS	2020	2019
13 Reimbursements for other than meals and entertainment.....		
14 Reimbursements for meals and entertainment.....		

Foreign Earned Income

ORG52

1 Foreign address (including country) and POD
2 Occupation
3 Employer's name
4 a Employer's U.S. Address
b Employer's Foreign Address
5 Employer is (Check any that apply):
a A foreign entity
b A U.S. entity
c Self
d A foreign affiliate of a U.S. company
e Other (specify)
6 a Last year Form 2555 was filed
b Check if Form 2555 has not been previously filed to claim either of the exclusions
c Either exclusion ever revoked?
d Enter type of exclusion and enter year for which the revocation was effective: Exclusion Year
7 Citizen/national of which country?
8 a Maintained a separate foreign residence for family due to adverse conditions?
b If 'Yes,' city and country of the separate foreign residence. Also, enter the number of days during the tax year that a second household maintained at the address.
9 Tax home(s) during tax year and date(s) established.

Taxpayers Qualifying Under Bona Fide Residence Test

10 Date bona fide residence began, and ended
11 Kind of living quarters in foreign country:
a Purchased house
b Rented house or apartment
c Rented room
d Quarters furnished by employer
12 a Did any of your family live with you abroad during any part of the tax year?
b If 'Yes,' who and for what period?
13 a Have you submitted a statement to the authorities of the foreign country where you claim bona fide residence that you are not a resident of that country?
b Are you required to pay income tax to the country where you claim bona fide residence?
If you answered 'Yes' to 13a and 'No' to 13b, you do not qualify as a bona fide resident. Do not complete the rest of this part.
14 a List any contractual terms or other conditions relating to the length of your employment abroad.
b Enter the type of visa under which you entered the foreign country.
c Did your visa limit the length of your stay or employment in a foreign country?
d Did you maintain a home in the United States while living abroad?
e If 'Yes,' enter address of your home, whether it was rented, and the names of the occupants, and their relationship to you.
15 Qualified housing expenses for the tax year

For use with Form 8801 Information

Table with 4 columns: Description, Prior year Form 2555, line 45 and line 50, and Form 8801 information. Rows include TP - Foreign Earned Income, TP - Housing, SP - FEI, SP - Housing, and Spouse information for both line 45 and line 50.

Federal Carryover Data

ORG55

2019 STATE AND LOCAL TAX INFORMATION

1	State or Local Identification	Paid With Extension	Estimates Paid After 12/31/19	Total Withheld/ Payments	Paid With Return	Total Overpayment	Applied Amount

OTHER TAX AND INCOME INFORMATION

2 2019 filing status:

Single
 Married filing jointly
 Married filing separately
 Head of household
 Qualifying widow(er)

3 Number of blind/elderly boxes checked for 2019 (Form 1040 or 1040-SR)

4 a Total itemized deductions allowed in 2019 (Schedule A, line 17)

b Check this box if you were required to itemize in 2019

5 Adjusted gross income in 2019 (Form 1040, line 11)

6 Total tax for Form 2210 or 2210-F in 2019 (Form 2210, line 4 or 2210-F, line 6)

7 Alternative minimum tax in 2019 (Schedule 2, Part I, line 1)

8 2019 federal overpayment applied to 2020 (Form 1040, line 36)

IRA INFORMATION

9 a Basis of taxpayer's IRA(s) as of 12/31/19 (Form 8606, line 14)

b Basis of spouse's IRA(s) as of 12/31/19 (Form 8606, line 14)

c Taxpayer's excess IRA contributions as of 12/31/19 (Form 5329, line 16)

d Spouse's excess IRA contributions as of 12/31/19 (Form 5329, line 16)

e Taxpayer's excess Archer MSA contributions as of 12/31/19 (Form 5329, line 40)

f Spouse's excess Archer MSA contributions as of 12/31/19 (Form 5329, line 40)

g Taxpayer's excess Roth IRA contributions as of 12/31/19 (Form 5329, line 24)

h Spouse's excess Roth IRA contributions as of 12/31/19 (Form 5329, line 24)

i Taxpayer's excess Coverdell ESA contributions as of 12/31/19 (Form 5329, line 32)

j Spouse's excess Coverdell ESA contributions as of 12/31/19 (Form 5329, line 32)

k Taxpayer's excess HSA contributions as of 12/31/19 (Form 5329, line 48)

l Spouse's excess HSA contributions as of 12/31/19 (Form 5329, line 48)

LOSS AND EXPENSE CARRYOVERS

10 a Short-term capital loss carryover from 2019 (Schedule D)

b Long-term capital loss carryover from 2019 (Schedule D)

c AMT Short-term capital loss carryover from 2019 (Schedule D)

d AMT Long-term capital loss carryover from 2019 (Schedule D)

11 a Net operating loss carryforward to 2020 – regular tax

b Net operating loss carryforward to 2020 – AMT

12 a Disallowed investment interest expense (Form 4952, line 7)

b Disallowed AMT investment interest expense (Form 4952-AMT, line 7)

13 a Nonrecaptured net Section 1231 loss from 2019

b Nonrecaptured net Section 1231 loss from 2018

c Nonrecaptured net Section 1231 loss from 2017

d Nonrecaptured net Section 1231 loss from 2016

e Nonrecaptured net Section 1231 loss from 2015

f AMT Nonrecaptured net Section 1231 loss from 2019

g AMT Nonrecaptured net Section 1231 loss from 2018

h AMT Nonrecaptured net Section 1231 loss from 2017

i AMT Nonrecaptured net Section 1231 loss from 2016

j AMT Nonrecaptured net Section 1231 loss from 2015

Federal Carryover Data (continued)

ORG55

CREDIT CARRYOVERS	
14 General business credit	
15 a Qualified adoption expenses carryforward from 2019	
b Qualified adoption expenses carryforward from 2018	
16 a Mortgage interest credit from 2019 (Form 8396, line 17)	
b Mortgage interest credit from 2018 (Form 8396, line 14)	
c Mortgage interest credit from 2017 (Form 8396, line 16)	
d Certificate credit rate (Form 8396, line 2).....	%
e Address of home claiming mortgage interest credit on Form 8396 if different from your personal address: _____ _____	
17 District of Columbia first-time homebuyer credit from 2019 (Form 8859, line 4)	
18 Minimum tax credit carryforward to 2020 (Form 8801, line 26).....	
19 Residential energy efficient property credit from 2019 (Form 5695, line 16).....	

OTHER CARRYOVERS	
20 Section 179 carryover from 2019 (Form 4562, line 13)	
21 Excess 2019 foreign housing deduction carryover:	
a Amount from Form 2555, Taxpayer's copy – line 46	
b Amount from Form 2555, Taxpayer's copy – line 48	
c Amount from Form 2555, Spouse's copy – line 46	
d Amount from Form 2555, Spouse's copy – line 48	

CHARITABLE CONTRIBUTION CARRYOVERS					
22 Carryover of charitable contributions from:	Cash and Other Property		Capital Gain		Cash
	(a) 50%	(b) 30%	(c) 30%	(d) 20%	(e) 60/100%
a 2019					
b 2018					
c 2017					
d 2016					
e 2015					

Foreign Tax Credit Carryovers from 2019

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FIRST FORM 1116

Passive category income
 General category income
 Re-sourced by treaty
 Lump-sum distributions

Regular Tax	Foreign Taxes	Disallowed	Utilized	Carryover
2010				
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				

Carryover to 2020

Alternative Minimum Tax	Foreign Taxes	Disallowed	Utilized	Carryover
2010				
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				

Carryover to 2020

SECOND FORM 1116

Passive category income
 General category income
 Re-sourced by treaty
 Lump-sum distributions

Regular Tax	Foreign Taxes	Disallowed	Utilized	Carryover
2010				
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				

Carryover to 2020

Alternative Minimum Tax	Foreign Taxes	Disallowed	Utilized	Carryover
2010				
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				

Carryover to 2020

Tax History

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	2016	2017	2018	2019
Filing status.....				
Total income.....				
Adjustments to income				
Adjusted gross income				
Tax expense.....				
Interest expense				
Contributions				
Miscellaneous deductions				
Other itemized deductions				
Total itemized/standard deduction.....				
Qualified business income deduction				
Exemption amount				
Taxable income				
Tax				
Alternative minimum tax				
Total credits				
Other taxes				
Payments				
Form 2210 penalty				
Amount owed.....				
Applied to next year's estimated tax				
Refund.....				
Effective tax rate %				
Tax bracket %.....				

GENERAL INFORMATION

1 Enter your state of residence **Taxpayer** _____ **Spouse** _____

2 Check the appropriate box if:

	Taxpayer	Spouse		
a Full year resident.....	<input type="checkbox"/>	<input type="checkbox"/>	Date of entry: _____	Date of exit: _____
b Part year resident.....	<input type="checkbox"/>	<input type="checkbox"/>		
c Nonresident.....	<input type="checkbox"/>	<input type="checkbox"/>		

3 Resident locality: _____

4 County: _____ School district: _____ School district number: _____

5 Check if disabled..... **Taxpayer** **Spouse**

STATE CREDITS

6 Description/type of credit (for example, solar energy, carpool)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

VOLUNTARY STATE CONTRIBUTIONS

7 Description/type of contribution (for example, wildlife, cancer)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

MISCELLANEOUS QUESTIONS

8 Did you file a state return for 2019? **Yes** **No**

9 Do you want state forms and instructions sent to you next year?

10 Do you want any applicable penalty and interest calculated and added to the return?

11 How do you want your state refund (if any) applied?

a Refunded b Apply to 2021 estimates c Apply to 2021 taxes

12 Additional state information: _____
