

Income Tax Organizer for Tax Year 2020

Name: _____ Spouse Name: _____
 DOB ___/___/____ Occupation _____ DOB ___/___/____ Occupation _____

Filing Information: *** If all information is unchanged, write "SAME" across each section below *******

Address _____
 City _____ State ___ ZIP _____
 *Previous year clients may check here if unchanged: Same
 Phone _____ Type _____
 Spouse Phone _____ Type _____
 Othr Phone _____ Type _____
 Othr Phone _____ Type _____
 Email: _____
 Spouse email: _____

Filing Status:
 Single **Head of Household** **Qualifying Widow**
 Married Filing Joint
 Married Filing Separate (Enter Name/SSN of Spouse in notes)
 Total Number of People Living in Your Home: _____
 Number to be Claimed as Dependents: _____
 Please provide information on any new dependents on page 2.
[!] New clients must provide all dependent information on page 2.

Income: *** Businesses Must Contact Our Office to Properly Submit Income & Expenses *******

Form Count

Provide Economic Stimulus Payment(s) No. 1 and 2 received.	EIP 1 (issued March to May)	\$ _____
	EIP 2 (issued Dec '20 to Feb '21)	\$ _____
If you or your spouse worked for an employer, list the number of W-2s provided.		W-2s _____
If you or your spouse received unemployment in the past year, list the number of 1099Gs provided.		1099G _____
If you/your spouse provided any services for non-employers, list the number of 1099-NECs received.		1099-NEC _____
If you or your spouse received interest from any bank, credit union, insurance companies, etc.		1099-INT _____
If you or your spouse received dividends from mutual funds or stocks, include forms 1099-DIV.		1099-DIV _____
If you or your spouse sold stocks or mutual funds, include forms 1099-B.		1099-B _____
If you or your spouse received Social Security/Social Security Disability (SSI), include forms SSA-1099.		SSA-1099 _____
If you or your spouse received regular retirement income/IRA distributions, include forms 1099-R.		1099-R _____ *
* Is any military retirement? ____ If it is for a deceased spouse, please list spouses DOB ___/___/___		
If you or your spouse withdrew from an IRA/401K as an early withdrawal, include forms 1099-R.		1099-R _____ *
* Please list the purpose of the early withdrawal _____		
If you or your spouse rolled over an IRA/401K to another account, include forms 1099-R.		1099-R _____
If you or your spouse received a state income tax refund, include form 1099G or fill in amount.		1099G ___ \$ _____
If you received any other income forms (ex: K-1 statement for partnership or S-Corp), list and provide.		Other _____
Please describe any other income received this year that you believe may affect your income tax return: _____ _____		

