



This Tax Organizer is designed to help you collect and report the information needed to prepare your 2021 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 2021 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, 2020 information is included for your reference. You do not need to make any 2020 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 2020 tax return (if not in our possession).
- Original Form(s) W-2.
- Schedule(s) K-1 and K-3 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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Taxpayer Information				Spouse Information			
Last name				Last name			
First name				First name			
Middle Initial.....		Suffix.....		Middle Initial.....		Suffix.....	
Social security number				Social security number			
Occupation				Occupation.....			
Work phone		Ext ...		Work phone.....		Ext ...	
Cell phone				Cell phone			
E-mail address.....				E-mail address.....			
Date of birth.....				Date of birth			
Address			Apartment number.....				
City		State.....		ZIP Code.....			
Home phone.....		Fax number		Home phone.....		Fax number	

Dependent Information					
First name	MI	Social Security Number	Date of Birth	Months Lived with Taxpayer	Child Care Expense
Last name	Suffix	Relationship			

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

Education Tuition and Fees
 Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid
 Enter total 2021 qualified student loan interest.....

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation

Employer Name	2020 Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	2020 Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits

	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099	_____	_____
Railroad Retirement Benefits from Form RRB-1099	_____	_____
Medicare B premiums withheld	_____	_____
Medicare C premiums withheld	_____	_____
Medicare D premiums withheld	_____	_____

Attach Form(s) 1099-MISC – Miscellaneous Income and 1099-NEC

1099-MISC Payer Name and 1099-NEC Payer Name

Attach Form(s) 1099-INT – Interest Income

1099-INT Payer Name	2020 Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV – Dividend Income

1099-DIV Payer Name	2020 Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

	Taxpayer	Spouse
Retirement Plan Contributions		
Traditional IRA contributions made for 2021	_____	_____
Roth IRA contributions made for 2021	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____

2021 Deductions

Medical and Dental Expenses	2021 Amount	2020 Amount
Prescription medications.....	_____	_____
Health insurance premiums	_____	_____
Doctors, dentists, etc	_____	_____
Hospitals, clinics, etc	_____	_____
Eyeglasses and contact lenses	_____	_____
Miles driven for medical purposes.....	_____	_____
Other medical and dental expenses: _____	_____	_____
Taxes	2021 Amount	2020 Amount
Real estate taxes paid on principal residence	_____	_____
Real estate taxes paid on additional homes or land	_____	_____
Auto license registration fees based on the value of the vehicle	_____	_____
Other personal property taxes	_____	_____
Interest Expenses		
Home mortgage interest paid – Attach Form(s) 1098. Lender's Name	2021 Amount	2020 Amount
_____	_____	_____
_____	_____	_____
Points paid on loan to buy, build or improve main home Lender's Name	2021 Amount	
_____	_____	
Cash/Check/Credit Contributions	2021 Amount	2020 Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
Noncash Charitable Contributions		
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.		
Miscellaneous Deductions	2021 Amount	2020 Amount
Union and professional dues	_____	_____
Professional subscriptions, books, supplies	_____	_____
Uniforms and protective clothing (including cleaning)	_____	_____
Job search costs	_____	_____
Taxpayer educator expenses.....	_____	_____
Spouse educator expenses.....	_____	_____
Tax return preparation fees	_____	_____
Safe deposit box rental	_____	_____
Gambling losses (to the extent of gambling income)	_____	_____
Other expenses (list): _____	_____	_____

- 1 Did you receive an Economic Impact (Stimulus) Payment? Yes No
 If yes, how much did you receive?
- 2 Did you receive any Advanced Child Tax Credit payments? Yes No
 If **yes**, how much did you receive?
- 3 Did a lender cancel any of your debt in 2021? (Attach any Forms 1099-A or 1099-C)..... Yes No
- 4 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2021? If **yes**, please attach details..... Yes No
- 5 Did you purchase a motor vehicle or boat during 2021 ? Yes No
 If **yes**, attach documentation showing sales tax paid.
- 6 Did you purchase a hybrid or electric vehicle in 2021? If **yes**, enter year, make, model, and date purchased: Yes No
- 7 Did you donate a vehicle in 2021? If **yes**, attach Form 1098C..... Yes No
- 8 What was the sales tax rate in your locality in 2021 ? % State ID
- 9 Did your marital status change during 2021? Yes No
 If **yes**, explain:
- 10 Were you or your spouse permanently and totally disabled in 2021? Yes No
- 11 Do you have dependents who must file?..... Yes No
- 12 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,200?... Yes No
- 13 Did you provide over half the support for any other person during 2021? Yes No
- 14 Did you incur adoption expenses during 2021 ? Yes No
- 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?..... Yes No
- 16 Did you receive any disability payments in 2021 ? Yes No
- 17 Did you receive tip income **not** reported to your employer? Yes No
- 18 Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2021 ? If **yes**, attach closing or escrow statements, 1099-C or 1099-A forms..... Yes No
a If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?..... Yes No
- 19 Did you incur any casualty or theft losses during 2021 ? Yes No
- 20 Did you incur any non-business bad debts?..... Yes No
- 21 Did you pay any individual for domestic services in 2021 ?..... Yes No
- 22 Did you take a retirement account distribution related to the corona virus or a natural disaster? Yes No
- 23 Did you buy or sell any stocks or bonds in 2021 ? Yes No
- 24 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?..... Yes No
- 25 Did you incur any moving expenses? If **yes**, attach details..... Yes No
- 26 Did you receive any income not included in this Tax Organizer?..... Yes No
 If **yes**, please attach information.
- 27 Do you expect your income and deductions in 2022 to be the same as 2021 ? Yes No
 If **no**, attach explanation of changes expected.
- 28 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach..... Yes No
- 29 At any time during 2020, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No
- 30 **a** Did you obtain a Paycheck Protection Program (PPP) loan? Yes No
b If yes, has any portion of that loan been forgiven? Yes No
- 31 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____
- 32 Enter your state of residence..... Taxpayer _____ Spouse _____
- 33a Do you want to change the language with which the IRS communicates with you? Yes No
b If yes, which language?.....

Electronic Filing and Direct Deposit of Refund

- If your tax return is eligible for Electronic Filing, would you like to file electronically?..... Yes No
- The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.
 If you receive a refund, would you like direct deposit? Yes No
 If **yes**, please provide a voided check (not a deposit slip) if your bank account information has changed.
 What type of account is this?..... Checking Savings

Estimated Tax Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)

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			
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*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.

2021
Tax Documents to Send to Preparer

▶ Check items enclosed.

Gather the following documents to send to your preparer.

- _____
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