

PERSONAL INFORMATION ORGANIZER
Please complete this Organizer before your appointment.

1. PERSONAL INFORMATION

Name		SSN or ITIN	Date of Birth	Date of Death	Occupation	Blind	Disabled
Taxpayer							
Spouse							
Street Address		Apt.	City or town	State	Zip Code	County	
Foreign country		Foreign province/state			Foreign postal code		
E-mail Address(es)				Taxpayer's Phone and Provider		Spouse's Phone and Provider	

2. FILING STATUS

Single Check if parent (or someone else) can claim you as a dependent on their return.
 Married Filing Joint
 Married Filing Separate Check if you lived apart from your spouse for all of 2021.
 Head of Household
 Qualifying Widow(er) Year spouse died: _____

3. DEPENDENTS

Name	Relationship	Date of Birth	SSN or ITIN	Months Lived With You	Disabled	Full Time Student	Dependent's Gross Income	Child Care Expenses Paid

4. REFUND INFORMATION (For refunds only)

1. Would you like to have any refunds directly deposited into your bank account? Yes No

Bank Account
 Ownership Taxpayer Spouse Joint
 Type Checking Savings
 Bank name _____
 Routing number _____
 Account number _____
 Account outside the jurisdiction of the United States? Yes

5. IDENTIFICATION INFORMATION (Please attach a copy front and back of IDs)

<p>Taxpayer Type of ID: <input type="checkbox"/> Driver's license <input type="checkbox"/> State-issued ID <input type="checkbox"/> No ID ID number _____ Location of issuance _____ Issue date _____ Expiration date _____ Document # _____</p>	<p>Spouse Type of ID: <input type="checkbox"/> Driver's license <input type="checkbox"/> State-issued ID <input type="checkbox"/> No ID ID number _____ Location of issuance _____ Issue date _____ Expiration date _____ Document # _____</p>
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6. HEALTH CARE INFORMATION

Please indicate where you received your health insurance from for all members of your tax household.
 Employer Government-Sponsored Marketplace(1095A) Private Exchange (Individual Insurance Company)

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1. Stimulus est. (\$1,400) Form -6470 (Typically received in March)

		Yes	No	Total <input type="checkbox"/>
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2. ADVANCE CHILD TAX CREDIT - PAYMENT AMOUNT RECEIVED Form -6419 **Opted Out Yes No**

July _____	August _____	September _____
October _____	November _____	December _____

3. ESTIMATED TAX PAYMENTS

Federal estimated payments	Date Paid	Amount Paid
Applied from 2020 federal refund	_____	_____
1st quarter payment	_____	_____
2nd quarter payment	_____	_____
3rd quarter payment	_____	_____
4th quarter payment	_____	_____

State estimated payments	Date Paid	Amount Paid	Local estimated payments	Date Paid	Amount Paid
Applied from 2020 state refund	_____	_____	Applied from 2020 local refund	_____	_____
1st quarter payment	_____	_____	1st quarter payment	_____	_____
2nd quarter payment	_____	_____	2nd quarter payment	_____	_____
3rd quarter payment	_____	_____	3rd quarter payment	_____	_____
4th quarter payment	_____	_____	4th quarter payment	_____	_____
State Name	_____	_____	Locality Name	_____	_____

4. CHILD CARE CREDIT

Attach Daycare Provider Statement(s):			Telephone	Identification	
Care Provider Name	Address	Tax-Exempt	Number	Number	Amount Paid
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____
_____	_____	<input type="checkbox"/>	_____	_____	_____

5. Virtual Currency: Have you bought, sold, or traded Cryptocurrency **Yes No**

- If yes, please download Coin Tracker (www.cointracker.io) to your Crypto wallets and attach the tax report to your tax documents.

6. Comments

INCOME ORGANIZER

Please complete this Organizer before your appointment.
Business, Farm and Rental and Royalty Income or Loss Organizers are on separate pages.

1. WAGE AND SALARY INFORMATION

Attach W-2s:

Employer Name	Taxpayer	Spouse
_____	<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"/>

Unreported tip income received: _____

4. SCHEDULE K-1 INCOME (1065, 1120-S AND 1041)

Attach K-1s:

Payer Name	Taxpayer	Spouse
_____	<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"/>

2. INTEREST AND DIVIDEND INCOME

Attach 1099-INT, 1099-DIV or other statements

Payer Name	Taxpayer	Spouse
_____	<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"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

5. CAPITAL GAINS AND LOSSES

Attach 1099-Bs:

Payer Name	Taxpayer	Spouse
_____	<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"/>

3. RETIREMENT DISTRIBUTIONS

Attach 1099-R & 5498	Roth	Other		
Payer Name	IRA	IRA	Taxpayer	Spouse
_____	<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"/>	<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"/>

Attach SSA 1099 or RRB 1099

	Yes	No
Did you receive social security benefits?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive railroad retirement benefits?	<input type="checkbox"/>	<input type="checkbox"/>

6. OTHER INCOME

Description	Amount
State income tax refund	_____
Alimony received	_____
Date of original divorce/separation agreement	_____
Unemployment compensation Form 1099G	_____
Gambling winnings	_____
Jury pay	_____
Hobby income	_____
Scholarships (grants)	_____
NOL Carryforward	_____
Child support	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

7. MISCELLANEOUS INCOME QUESTIONS

1. Did you sell your home? Yes No
2. Did you earn any foreign income or pay any foreign taxes? Yes No
3. Do you have a health savings account (HSA), Archer MSA or Medicare Advantage (MA) MSA? Yes No
4. Did you have a financial account in a foreign country (i.e. bank account, securities account, etc.)? Yes No
If Yes, did the aggregate value of all financial accounts exceed \$10,000 at any time during 2021? Yes No
5. Did you have any debt forgiven (i.e. student loans, home mortgage, etc.)? Yes No
6. Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No

1. EDUCATION

Attach 1098-Ts, 1098-E's and 1099-Q's:						Student Loan	Books, Supplies			
Student Name	Educational Institution	Fr	So	Jr	Sr	Oth	Tuition & Fees	Interest Paid	& Equipment	529 Plan
_____	_____	<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"/>	<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"/>	<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"/>

2. JOB-RELATED MOVING EXPENSES

Description	Amount
Lodging	_____
Gas and Oil	_____
Mileage	_____
Other	_____
Miles from old home to your new workplace	_____
Miles from old home to old workplace	_____
Member of the Armed Forces?	<input type="checkbox"/> Yes <input type="checkbox"/> No

4. OTHER DEDUCTIONS

Description	Amount
Educator expenses	_____
Alimony paid Rec. SSN: _____ Date of original divorce/separation _____	_____
Health Savings Account contributions	_____
Archer Medical Savings Account contributions	_____
Jury duty repayment to employer	_____
Foreign qualified housing expenses	_____
Contributions to College 529 Savings Plan	_____
Qualified business net (loss) carryover from 2020	_____
Qualified REIT dividends and PTP net (loss) carryover	_____
_____	_____
_____	_____
_____	_____

3. IRA CONTRIBUTIONS

Description	Amount
Contributions to a Traditional IRA	_____
Contributions to a ROTH IRA	_____

5. MISCELLANEOUS DEDUCTION QUESTIONS

- Did you purchase an item(s) during 2021 for which you paid a large amount of sales tax? Yes No
- Did you refinance a mortgage during 2021? Yes No

6. MISCELLANEOUS PERSONAL INFORMATION QUESTIONS

- Check the applicable boxes if you wish to contribute \$3 to the Presidential Election campaign fund. Taxpayer Spouse
- Were you a victim of identity theft and have you been contacted by the IRS? Yes No
If Yes, please furnish the 6-digit PIN issued to you by the IRS _____
- Were you (or your spouse if filing jointly) a nonresident alien for any part of 2021? Yes No
- Have you received any notices or correspondences from the IRS or state in the past 3 tax years? Yes No
- Do you have any children age 18 or under (or student under age 24) who had unearned income of more than \$2,200? Yes No
- If any of your children are required to file a return, do you elect to report your child's interest and dividends on your return? Yes No
- Did you give a gift of more than \$15,000 to one or more people? Yes No
- If age 65 or older, do you want to file Form 1040-SR, U.S. Tax Return for Seniors, instead of Form 1040? Yes No

7. MISCELLANEOUS CREDIT QUESTIONS

- Did you pay any expenses related to the adoption of an eligible child? Yes No
- Are you currently repaying the First-Time Homebuyer Credit? Yes No
- Do you (and your spouse) have a social security number that allows you to work and is valid? Yes No
- Were you issued a Mortgage Credit Certificate (MCC) by a state or local governmental unit or agency? Yes No