

Name \_\_\_\_\_

SSN \_\_\_\_\_

## Questions

Yes No

<input type="checkbox"/>	<input type="checkbox"/>

### Personal Information

- 1 Did any births, adoptions, marriages, divorces, or deaths occur in your family since last year?
- 2 If yes to above, and you had either a birth or adoption, please provide a copy of your dependent's Social Security Card.
- 3 Did you purchase or sell your principal residence or did your address change?
- 4 If yes to above, please provide a copy of the final closing settlement statement.
- 5 Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return?
- 6 Did you receive any advance child tax credit payments? If yes, please provide a list of payments in Comments.
- 7 Were you in a Registered Domestic Partnership, civil union or same-sex marriage during 2021?
- 8 Were either you or your spouse in the military or National Guard?
- 9 Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax correspondence?
- 10 Have you or your spouse been an identity theft victim and given an identity theft protection six digit PIN by the IRS?

Yes No

<input type="checkbox"/>	<input type="checkbox"/>

### Dependents & Education

- 1 Are there any changes in your dependents from last year?
- 2 Did you have any children under 19 (or 24 if a full time student) who received more than \$1,100 in investment income?
- 3 Did you pay education expenses for you or your dependent children?
- 4 Did anyone in your family receive a scholarship of any kind during 2021?
- 5 Did you pay any dependent care expenses for a child or a parent?
- 6 Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent?
- 7 Are all of your dependents either US residents or citizens?
- 8 Did you pay over half of the support for all of your dependents?

Yes No

<input type="checkbox"/>	<input type="checkbox"/>

### Income (In 2021, did you or your spouse have any of the following?)

- 1 Did you receive alimony from a divorce decree dated on or prior to December 31, 2018?
- 2 Did you earn any gambling income? (include form(s) W-2G, if applicable). Be sure to include any gambling losses.
- 3 Did you receive tip income NOT reported to your employer?
- 4 Did you barter your services for goods or services from someone else?
- 5 Did you receive a housing allowance for ministerial services you provided?
- 6 Did you receive any income not reported in this Organizer?
- 7 Did you have any non-taxable income that wasn't reported on a tax form, such as veteran's pay or non-taxable disability?

Yes No

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

### Foreign Reporting

- 1 Did you have an interest in or signature authority over a financial account in a foreign country?
- 2 Were you the grantor of or transferor to a foreign trust?
- 3 Did you receive income from a foreign source or pay taxes to a foreign government?

Yes No

<input type="checkbox"/>	<input type="checkbox"/>

### Retirement Plans

- 1 Did you rollover a retirement plan distribution into another plan?
- 2 Did you convert a traditional IRA to a Roth IRA?
- 3 Did you make a contribution to a Roth IRA, or do you plan on making one by April 15, 2022?
- 4 Did you make a contribution to a Traditional IRA, or do you plan on making one by April 15, 2022?
- 5 Did you receive an early distribution from a retirement plan?
- 6 Did you receive an early distribution for a Coronavirus (CARES Act) qualified distribution in 2020?
- 7 If yes to above, did you elect to pay the associated tax over three years (2020, 2021, & 2022)?
- 8 If yes to #7, did you make any repayments?
- 9 Did you receive an early distribution for a qualified birth or adoption distribution?
- 10 Did you make any contributions to an HSA (Health Savings Account) in 2021?
- 11 If you had an HSA, did you make distributions from the plan? Please provide Form 1099-SA.

Yes No

<input type="checkbox"/>	<input type="checkbox"/>

### Purchases, Sales, Gains and Losses

- 1 Did you buy or sell any real estate during the year?
- 2 Did you sell any assets through the use of an installment sale, either this year or in a prior year?
- 3 If yes to above, did you receive proceeds during 2021?
- 4 Did you exchange any property for other property?
- 5 Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?
- 6 If yes to above, do you have a record of each sale or exchange, along with its associated cost/basis?
- 7 Did you purchase a new vehicle, aircraft or boat?

Yes No

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

### Business and Rental Property - Schedule C and E filers only

- 1 Did you sell any part of an existing business, or sell business assets?
- 2 Did you cease operating any business or rental property?

- |                          |                          |    |  |
|--------------------------|--------------------------|----|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 3  | Did you remove any of your business assets for personal use?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 4  | Did you use part of your home for business purposes?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 5  | Did you purchase any furniture or equipment for your business?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 6  | Did you make any contributions to a business retirement plan, such as a SEP, SIMPLE or solo-401k?        |
| <input type="checkbox"/> | <input type="checkbox"/> | 7  | Do you pay for any health or long term care insurance through your business?                             |
| <input type="checkbox"/> | <input type="checkbox"/> | 8  | If you or your spouse are self-employed, are either of you covered under an employer's health plan?      |
| <input type="checkbox"/> | <input type="checkbox"/> | 9  | Did you make any improvements to your rental or investment properties?                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | 10 | Were all of your rental properties rented or available for rent for all 365 days of 2021?                |
| <input type="checkbox"/> | <input type="checkbox"/> | 11 | Did you use your car for business use (not including to and from work - considered "commuting")?         |
| <input type="checkbox"/> | <input type="checkbox"/> | 12 | If you incurred business mileage, did you track your mileage? Do you have a mileage log?                 |
| <input type="checkbox"/> | <input type="checkbox"/> | 13 | Did you receive a PPP loan, EIDL, or other grant income? Please be specific and tell us in the Comments. |
| <input type="checkbox"/> | <input type="checkbox"/> | 14 | Have you applied for an Employee Retention Credit (ERC) for 2020 or 2021?                                |

- |                          |                          |  |  |
|--------------------------|--------------------------|--|--|
| <b>Yes</b>               | <b>No</b>                | <b><u>Other Deductions &amp; Credits</u></b> |  |
| <input type="checkbox"/> | <input type="checkbox"/> | 1  | Did you receive an economic stimulus payment in 2021? Please list the amount of your payment in the Comments.        |
| <input type="checkbox"/> | <input type="checkbox"/> | 2  | Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?          |
| <input type="checkbox"/> | <input type="checkbox"/> | 3  | Did you pay expenses for the care of your child or other dependent so you could work?                                |
| <input type="checkbox"/> | <input type="checkbox"/> | 4  | Did you purchase a 'clean fuel' or electric hybrid vehicle in 2021?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 5  | Did you make energy efficient improvements to your home or purchase any energy-saving property during 2021?          |
| <input type="checkbox"/> | <input type="checkbox"/> | 6  | Did you refinance a mortgage or take out a home equity loan during 2021?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 7  | If yes to above, please provide a copy of the final closing/settlement statement.                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | 8  | Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? |
| <input type="checkbox"/> | <input type="checkbox"/> | 9  | Did you pay any student loan interest?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 10   | Did you make any federal or state estimated payments?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 11   | Did you pay alimony based on a divorce decree finalized on or prior to December 31, 2018?                            |
| <input type="checkbox"/> | <input type="checkbox"/> | 12   | Did you make non-cash donations?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 13   | Did you donate a vehicle?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 14   | Did you receive written notification for all donations of \$250 or more?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 15   | Did you make any cash donations to qualified charitable entities? Please provide a list of charities and amounts.    |
| <input type="checkbox"/> | <input type="checkbox"/> | 16   | Did you receive a discharge of student loan debt?  |

- |                          |                          |                             |   |
|--------------------------|--------------------------|-----------------------------|---|
| <b>Yes</b>               | <b>No</b>                | <b><u>Miscellaneous</u></b> |   |
| <input type="checkbox"/> | <input type="checkbox"/> | 1                           | Did you make gifts of more than \$15,000 to any one person?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 2                           | Did you engage the service of any household employees?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 3                           | Did your bank account information change within the last twelve months?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 4                           | Do you want to allocate \$3 to the Presidential Election Campaign Fund?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 5                           | Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | 6                           | Did you claim a First-time Homebuyer Credit for a home purchased in 2008?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 7                           | Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit? |
| <input type="checkbox"/> | <input type="checkbox"/> | 8                           | Did you're driver's license expire during 2021? If so, please provide us with a copy of your updated license.     |

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|--------------------------|--------------------------|---|---|
| <b>Yes</b>               | <b>No</b>                | <b><u>Return preparation and filing</u></b> |   |
| <input type="checkbox"/> | <input type="checkbox"/> | 1   | Do you want to e-file your return?  |
|                          |                          | 2   | If you are due a refund, how do you want to receive it?   |
|                          |                          |   | <input type="checkbox"/> Check sent to you in the mail <input type="checkbox"/> Other quick refund via a bank product   |
|                          |                          |   | <input type="checkbox"/> Apply to next year's estimates <input type="checkbox"/>  |
|                          |                          |   | <input type="checkbox"/> Direct deposit (please provide voided blank check) Type of account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings                   |
|                          |                          |   | If you owe taxes, how do you want to pay them? <input type="checkbox"/>   |
|                          |                          |   | <input type="checkbox"/> Paper check sent with my return <input type="checkbox"/> Credit card <input type="checkbox"/> Installment Agreement                                      |
|                          |                          |   | <input type="checkbox"/> Direct debit (please provide a voided blank check) Type of account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings                   |
| <input type="checkbox"/> | <input type="checkbox"/> | 3   | Do you want to allow your tax preparer to discuss this year's return with the IRS?<br>If no, enter another person (if desired) to be allowed to discuss this return with the IRS: |
|                          |                          |   | Designee's name _____ Phone Number _____ Personal identification Number (5 digit PIN) _____   |
| <input type="checkbox"/> | <input type="checkbox"/> | 4   | Would you prefer to receive a copy of your tax return(s) on paper? (We will provide you with an electronic copy by default.)  |