

2021 Individual Tax Organizer

Taxpayer information

First _____ MI ____ Last _____ Suffix _____
Street _____ Apt. _____ City _____ State/Province _____
ZIP/Postal code _____ Country _____ Phone _____
Email _____ SSN/ITIN _____
Occupation _____ DOB _____ DOD _____

- Blind
- Can be claimed as a dependent by another individual
- Would you like to contribute \$3 to the presidential election campaign fund?
- Permanently and totally disabled
- Spouse passed away within the past two years
- Taxpayer is filing a tax return with the IRS for the first time
- None of the above

Select life events that occurred during 2021

- Had a child
- Adopted a child
- Changed marital status
- Changed employer
- Changed residence
- Started or sold a business
- Received correspondence from the IRS or a state agency
- Taxpayer, spouse, or dependent is a non-U.S. citizen
- Taxpayer, spouse, or dependent changed name with the Social Security Administration
- Taxpayer, spouse, or dependent received an Identity Protection PIN from the IRS
- Taxpayer, spouse, or dependent passed away
- Changed domicile state (military)
- None of the above

Filing status

- Single
- Married filing jointly
- Married filing separately
- Head of household
- Qualifying widow(er) with dependent child

Select income sources in 2021

- Wages from employment (W-2)
- Interest (1099-INT)
- Dividends and/or distributions (1099-DIV)
- Retirement plan distributions (1099-R)
- Social Security benefits (SSA-1099)
- Sold stocks or investments (1099-B)
- State or local tax refund (1099-G)
- Self-employed (1099-NEC)
- Received Schedule K-1 from a partnership, S-corporation, estate, or trust
- Owned rental property or collected rent from roommates
- Received alimony from a divorce executed on or before 12/31/2018
- Gambling winnings (W-2G)
- Owned or operated a farm
- Miscellaneous income (1099-MISC)
- Disability income
- Unemployment compensation (1099-G)
- Distribution from Coverdell ESA or 529 plan (1099-Q)
- Distribution from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA)
- Income from property sold prior to this year (installment sale)
- Other income not listed above
- None of the above

Select expenses that applied in 2021

- Donations to charity (cash or non-cash)
- Interest payments (mortgage, vacation home, investments, etc.)
- State and/or local taxes
- Real estate taxes
- Medical & dental expenses
- Contributions to a retirement plan
- Student loan interest
- Expenses for higher education
- Expenses related to child or dependent care (Please provide dollar amount, EIN/SSN & address of provider)
- Paid alimony for a divorce executed on or before 12/31/2018 (Need: Name/SSN of recipient)
- Business use of home (not related to W-2 employment)
- Contributions to Health Savings Account (HSA) or Medical Savings Account (MSA)
- Contributions to Education Savings Account (ESA) or Qualified Tuition Program (QTP)
- Home services (housekeeper, gardener, caregiver, etc.)
- Penalty for early withdrawal of savings
- Armed Forces moving expenses
- Unreimbursed work-related expenses as a teacher, Armed Forces reservist, performing artist, fee-based state or local government official, or individual with a disability
- Business expenses related to Sch. C, Sch. E. and/or 1099 income received
- None of the above

Select financial events that occurred in 2021

- Bought or sold a home (including a rental property)
- Refinanced home or took out a second mortgage
- Made energy-efficient improvements to home (e.g. air conditioning, furnace, water heater, insulation)
- Received or exercised stock options
- Made a major purchase of a car, boat, motorhome, airplane, etc.
- Made gifts of more than \$15,000 to one or more individuals
- Received forgiveness of debt or forgave debt owed to you
- Received, sold, sent, exchanged, or otherwise acquired virtual currency
- Had foreign activities, income, savings, investments, trust, or business interests
- Had a financial interest in or signature authority over a foreign financial account
- Converted or rolled over IRA or other qualified plan (401(k), 403(b), etc.) to Roth IRA
- Incurred property damage or theft caused by a federally declared disaster
- Had foreign bank accounts that have in aggregate \$10,000 or more
- Did NOT have health insurance coverage for the entire year (CA, DC, MA, NJ, and RI only)
- Purchased health insurance through the Marketplace or public exchange (Form 1095-A)
- None of the above

Would you like to file your tax return electronically?

- Yes
- No

Would you like to use a bank account to do any of the following?

- Electronic direct deposit of refund
- Electronic payment of tax due when the return is filed
- Electronic payment of tax due when an extension is filed
- Electronic payment of 2022 quarterly estimated taxes

Financial institution _____ **Routing number** _____

Account holder _____ **Account number** _____

Type (select all that apply): Checking Savings Biz. Personal IRA Non-U.S.

Enter estimated payments or prior year's refund application below (if applicable):

Federal & State

Description	Federal date	Federal amount	State date	State amount
Overpayment applied from prior year				
First quarterly payment				
Second quarterly payment				
Third quarterly payment				
Fourth quarterly payment				
Additional payment				

Did you receive the third Economic Impact (stimulus) Payment?

- Yes Amount received \$ _____
- No

Did you receive advance payments of the Child Tax Credit?

- Yes
- No

	Date	Amount
First Payment		
Second Payment		
Third Payment		
Fourth Payment		
Fifth Payment		
Sixth Payment		