

Tax Year 2021

Client Tax Organizer

Tax Return Appointment: Date: _____ Time: _____ PM

Please complete this Organizer before your appointment. Include all statements (W-2s, 1099s, etc.)

1. Personal Information		Taxpayer		Spouse	
First name & Initial					
Last name					
Social Security number					
Date of birth					
Occupation					
E-mail address					
Work phone		Cell		Work	Cell
Home phone		Fax		Home	Fax
Address					Apt/Suite
City				State	ZIP
Taxpayer Legally Blind		<input type="checkbox"/> Yes	<input type="checkbox"/> No	Spouse Legally Blind	
Taxpayer Disabled		<input type="checkbox"/> Yes	<input type="checkbox"/> No	Spouse Disabled	
Pres. Campaign Fund (Taxpayer)		<input type="checkbox"/> Yes	<input type="checkbox"/> No	Pres. Campaign Fund (Spouse)	
Filing status: Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Married filing joint <input type="checkbox"/> Married filing separate <input type="checkbox"/> Widower <input type="checkbox"/> Year of Spouse death? _____					

2. Dependents (Children & Others)							
Name	Relationship	Date of Birth	Social Security Number	Months Lived With You	Disabled	Full Time Student	Dependent's Gross Income

Please answer the following questions to determine maximum deductions:

- | | |
|---|---|
| <p>1. Did your marital status change during the year? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>2. Did your address change during the year? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>3. Were there any changes in dependents? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>4. Did you receive unreported tip income of \$20 or more in any month? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>5. Did you receive any unemployment or disability income? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>6. Did you buy or sell any stocks, bonds or other investment property? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>7. Did you purchase, sell, or refinance your principal home or second home, or take out a home equity loan? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>8. Did you convert part or all of your traditional/SEP/SIMPLE IRA to a ROTH IRA? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>9. Could you be claimed as a dependent on another person's tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>10. Did you pay anyone for domestic services in your home? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>11. Did you pay anyone for childcare services? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>12. Did you pay tuition or other education expenses for yourself or a dependent? (Attach Form 1098-T) <input type="checkbox"/> Yes <input type="checkbox"/> No</p> | <p>13. Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>14. Did you give a gift of more than \$15,000 to one or more people? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>15. Did you go through bankruptcy, foreclosure, or repossession proceedings? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>16. Did you incur a loss because of damaged or stolen property? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>17. Were you notified or audited by either the IRS or State taxing agency? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>18. Did you work from a home office or use your car for business? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>19. May the IRS discuss your tax return with your preparer? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>20. Were you a citizen of, have income from, or live in a foreign country? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>21. Did you own or have interest in any foreign assets or accounts, or have signature authority with any foreign financial accounts? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>22. Do you want to electronically file your tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>23. Did you buy any internet merchandise for which you did not pay sales/use tax? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>24. Health Insurance. Did you have ACA compliant health insurance during the year? (Attach Form 1095-A, 1095-B, and/or 1095-C) <input type="checkbox"/> Yes <input type="checkbox"/> No</p> |
|---|---|

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13. Medical/Dental Expenses

Medical insurance premiums (paid by you) . . . _____
Long Term Care insurance _____
Prescription drugs _____
Glasses, contacts _____
Hearing aids, batteries _____
Braces _____
Medical equipment, supplies _____
Nursing care _____
Medical therapy _____
Hospital _____
Doctor/Dental/Orthodontist _____
Mileage _____

14. Taxes Paid

Real property tax (attach bills) _____
Personal property tax _____
Other: _____

15. Interest Expense

Mortgage interest paid (attach 1098's) _____
Interest paid to individual for your home
(attach amortization schedule) _____
Paid to:
Name _____
Address _____
Social Security No. _____
Investment interest _____

16. Casualty/Theft Loss

For property damaged by storm, water, fire, accident, or stolen.
Location of property _____
Description of property _____
Amount of damage _____
Insurance reimbursement _____
Repair costs _____
Federal grants received _____

17. Estimated Tax Payments

Federal Amount		State Amount	
LY - Jan 15	_____	LY - Jan 15	_____
Q1 - Apr 15	_____	Q1 - Apr 15	_____
Q2 - Jun 15	_____	Q2 - Jun 15	_____
Q3 - Sep 15	_____	Q3 - Sep 15	_____
Q4 - Jan 15	_____	Q4 - Jan 15	_____

18. Charitable Contributions (receipts required)

Church _____
United Way _____
Scouts _____
Telethons _____
University, Public TV/Radio _____
Heart, Lung, Cancer, etc. _____
Wildlife Fund., Humane society _____
Salvation Army, Goodwill _____
Other: _____
Non-Cash _____
Address _____
City/State/Zip _____
Value of goods (attach list if more than one) _____
Volunteer mileage _____

19. Miscellaneous/Unreimbursed Expenses

Dues - union, professional _____
Books, subscriptions, supplies _____
Licenses _____
Tools, equipment, safety equipment _____
Uniforms (including cleaning) _____
Sales expense, gifts _____
Tuition, Books (work related) _____
Entertainment _____
Tax preparation fee _____
Safe deposit box _____
IRA custodial fees _____
Investment periodicals, advisory fees _____
Job search expense _____
Moving of household goods (job related) _____
Other: _____
Other: _____

20. Day Care Expense (Form 2441)

Provider #1 _____
Address _____
City/State/ZIP _____
EIN/SS# _____ Amt Pd _____
Phone number _____
Provider #2 _____
Address _____
City/State/ZIP _____
EIN/SS# _____ Amt Pd _____
Phone number _____
Children cared for _____

Self Employment Information

Business Name

Total Sales		Taxpayer <input type="checkbox"/>	Spouse <input type="checkbox"/>
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Expenses			
Advertising		Repairs Expense	
Commissions/Fees		Supplies Expense	
Dues & Publications		Taxes	
Interest Expense		Travel Expense	
Insurance		Meals & Entertainment	
Legal & Professional Fees		Telephone	
Office Expense		Utilities	
Rent (office) Expense		Wages (gross W-2)	
Equipment Rental Expense		Postage	
Auto Expense		Bank Charges	
Auto Mileage		Tools & Equipment	
		Uniforms	

Assets Purchased			Notes
Date	Amount	Asset	

Cost of Goods Sold	
Inventory at beginning of year	Material & supplies
Purchases	Other:
Cost of items for personal use	Other:
Cost of labor	Inventory at end of year

Rental Income	Property #1	Property #2	Property #3	Property #4
Address				
City/State				
Rent Received				
Expenses				
Advertising				
Auto & Travel				
Auto Miles				
Cleaning & Maintenance				
Commissions Paid				
Grounds & Gardening				
Insurance				
Interest Expense				
Legal & Professional				
Management Fees				
Repairs & Maintenance				
Supplies				
Taxes				
Utilities				
Association Dues				
Pest Control				
Other:				
Other:				
Other:				
Other:				
Other:				
Other:				

CLERGY DEDUCTIONS

Client: _____

ID# _____

Tax Year 2021

The purpose of this worksheet is to help you organize your tax deductible business expenses. In order for an expense to be deductible, it must be considered an "ordinary and necessary" expense. You may include other applicable expenses. Do not include expenses for which you have been reimbursed, expect to be reimbursed, or are reimbursable.

Parsonage Allowance	
Interest - home	
Allowance received	
Taxes - home	
Rent - home	
Repairs - home	
Insurance - home	
Utilities - home	
Other _____	
Other _____	
Other _____	
Other _____	
Other _____	
Other _____	
Total	

Professional	
Professional dues	
Religious subscriptions	
Business Associations	
Secretarial	
Bookkeeper	
Other _____	
Other _____	
Total	

Continuing Education	
Correspondence Course	
Course Registration	
Materials & supplies	
Photocopy	
Reference material	
Seminar fees	
Textbooks	
Other _____	
Other _____	
Total	

Insurance	
Equipment	
Other _____	
Total	0

Vehicle & Travel	
See Vehicle, Travel & Entertainment Worksheet	

Supplies/Equipment	
Music books	
Theology books	
Business cards	
Clerical service	
Greeting cards	
Insurance	
Legal & professional fees	
Map book	
Pager	
Photocopy	
Postage	
Software	
Office equipment	
Office supplies	
Computer	
Vestments	
Vestments - cleaning	
Vestments - repair	
Other _____	
Other _____	
Other _____	
Other _____	
Total	

Telephone	
Answering machine	
Answering Service	
Cell Phone	
Pay Phone	
Toll Calls	
Fax line	
Other _____	
Total	

Other Information	

Prepared By: _____

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01-09-2022

VEHICLE AND TRAVEL EXPENSE

Client: _____

ID# _____

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Vehicle Expense	
Description of vehicle	
Date placed in service	
Odometer reading beginning of year	
Odometer reading end of year	
Total miles	
Business miles	
Commute miles	
Daily average round-trip commute	
Personal miles	
Is car leased?	Yes _____ No _____
Is car owned (or financed)	Yes _____ No _____
Was this vehicle depreciated in a prior year?	Yes _____ No _____
Gas, lube, oil	
Repairs & Maintenance	
Tires	
Towing	

Vehicle Expense	
Insurance	
Auto license/reg	
Personal property tax	
Lease payments	
Interest	
Auto club	
Warranty	
Smog Certificate	
Other _____	
Other _____	
Total	

Travel Expense	
Airfare, train	
Car rental & gas	
Parking, tolls	
Taxi, bus, shuttles	
Lodging	
Meals	
Entertainment	
Tips	
Telephone	
Dry Cleaning	
Number of days out of town	
Other _____	
Other _____	
Total	

Other Information

Prepared By:

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