

## 2020 Income Tax Organizer

This Tax Proforma/Organizer package was designed to assist you in collecting the information we need for the preparation of your 2020 income tax return. The following pages contain many of the common income tax items expenses, deductions and credits. You will also be asked to answer certain questions which will help us determine the best way to handle certain items of income or deduction.

Where appropriate, amounts reported on your 2019 income tax return are listed in the shaded right-hand column. Please take time to completely fill out the pages that apply to you and furnish us with any supporting documentation as required. This will enable us to prepare a complete and accurate income tax return. If you need more space, please attach additional schedules.

We will also need the following information:

- Copy of your prior year income tax return (if not in our possession).
- Original Form(s) W-2 and 1099-R received from all employers.
- Original Form(s) 1095-A, 1095-B and 1095-C received.
- Copies of other compensation, moving expense reimbursement, or pension documentation.
- Form(s) 1099 or other statements reporting interest and dividend income received.
- Form(s) 1099B and any other closing documentation regarding the sale or purchase of assets.
- Schedule K-1 showing your share of income and deductions from partnerships, S corporations, estates and trusts.
- Form(s) 1098, copies of real estate bills, property tax bills, mortgage statements, etc.
- Any other information or statements that you received or that you may have questions about.
- CP Notice 28 - Taxable IRA from Roth Rollover

We hope this Tax Proforma/Organizer will help make your task easier. It will certainly help us evaluate your income tax situation thoroughly and concentrate our efforts in preparing a complete and accurate income tax return.



# QUESTIONNAIRE

Did your filing status change during 2020 ?  YES  NO

Will the address on your 2020 Federal return be different from the one shown on your 2019 return?  YES  NO

If YES, enter the New Address:

Street \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip Code \_\_\_\_\_

Were you notified by the Internal Revenue Service or any other taxing authority of changes to a prior year tax return? (If YES, please enclose report notifying you of the change(s).)  YES  NO

Did you have minimum essential health care coverage for yourself, your spouse (if filing jointly), and anyone you could or did claim as a dependent for every month of 2020 ?  YES  NO

Did you, your spouse, or a dependent enroll in health insurance through the marketplace/exchange?  YES  NO

Are you aware of any changes to your income, deductions and credits reported on a prior year return?  YES  NO

Did you sell and/or purchase a principal residence in 2020 ?  YES  NO

Did you receive any insurance or other reimbursement from a prior year medical, casualty, or theft loss deduction?  YES  NO

Do you have any dependent children under 18 who received unearned income (interest, dividends, investment income) of over \$1,900?  YES  NO

If YES, and if your child qualifies, do you elect to report your child's interest and dividends in your income tax return?  YES  NO

Did you or your spouse receive stock from an employer's stock bonus plan (do not include amounts reported on Form W-2)?  YES  NO

Did you buy or sell any bonds during the year? (If YES, please provide a copy of the broker's report.)  YES  NO

Did you start a new business during 2020 ?  YES  NO

Did you receive payments from a pension or profit-sharing plan?  YES  NO

Did you sell business or personal property(ies) on the installment method, OR did you receive payments from an installment sale? (If YES, please provide details)  YES  NO

Did you surrender any U.S. savings bonds during 2020 ?  YES  NO

Did you use the proceeds from Series EE U.S. savings bonds purchased after 1989 to pay for higher education expenses?  YES  NO

Did you receive tip income NOT reported to your employer?  YES  NO

Did you receive any tax-exempt interest?  YES  NO

Did you obtain a loan and use the proceeds for an investment?  YES  NO

# QUESTIONNAIRE

- If employed, are you covered under a pension, profit-sharing, stock bonus or other retirement plan?  YES  NO
- 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
- Did you rollover any amount from a Traditional IRA to a Roth IRA during 2018 , 2019 , or 2020 ?  YES  NO
- Did you receive any disability payments this year?  YES  NO
- If either you or your spouse are self-employed, are either of you covered under an employer's health plan at another job?  YES  NO
- Did you have foreign income or pay any foreign taxes in 2020 ?  YES  NO
- Did you sell property or equipment on installment in 2020 ?  YES  NO
- Did you have any business related educational expenses?  YES  NO
- Did you make gifts of more than \$14,000 to any individual?  YES  NO
- Did you make gifts to a trust?  YES  NO
- Did you suffer an uninsured casualty or theft loss on a non-business property?  YES  NO
- Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are paid to beneficiaries named by you?  YES  NO
- Did you receive any income not included in the Tax Organizer?  YES  NO
- Did you pay any qualifying education expenses for yourself or any dependents?  YES  NO
- Did you make any online purchases for which you did not pay state sales tax?  YES  NO  
If so, enter the amount of purchases here. \_\_\_\_\_

**Notes:** \_\_\_\_\_  
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Please make certain to report all income received in 2020 . If you received income that is not included in this proforma organizer, attach a schedule listing the income received. Also, describe the nature of the income received (type of income, how received, etc.).