



## 2021 SIMPLIFIED TAX ORGANIZER

*(This simplified version may be completed in lieu of the longer standard version if desired.)*

**PERSONAL INFORMATION** *(Please review all information for changes and/or corrections.)*

Description	Taxpayer	Spouse
<b>Full Name:</b>		
<b>Birthdate:</b>		
<b>Occupation:</b>		
<b>Driver's License #:</b>		
<b>Expiration Date:</b>		
<b>Issue Date &amp; State:</b>		

**CONTACT INFORMATION** *(Please verify information and change if necessary):*

Description	Information		
<b>Mailing or Street Address:</b>			
<b>Phone Number(s):</b>			
<b>Email Address(es):</b>			

**DEPENDENT INFORMATION** *(Please include information for new dependents):*

Full Name	SSN ( <i>if new</i> )	Birthdate

**ESTIMATED TAX PAYMENTS** *(Please list any other state payments needed on a separate sheet):*

Detail	Federal		Primary State (___)		Secondary State (___)	
	Amount	Date	Amount	Date	Amount	Date
Prior Year Overpayment	\$		\$		\$	
1 <sup>st</sup> Quarter (Due 4/15/21)						
2 <sup>nd</sup> Quarter (Due 6/15/2021)						
3 <sup>rd</sup> Quarter (Due 9/15/2021)						
4 <sup>th</sup> Quarter (Due 1/18/2022)						
Extension (Due 4/18/2022)						
Other ( <i>Describe</i> ):						

*I (We) are submitting this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct and complete to the best of my (our) knowledge.*

**Taxpayer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Spouse Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**MISCELLANEOUS RECEIPTS**

<b>Economic Impact Payments (3<sup>rd</sup> Stimulus):</b>		<b>Taxpayer</b>	<b>Spouse</b>
If you or your spouse received an economic impact payment (3 <sup>rd</sup> stimulus check) during 2021, <b>please provide the exact total amount(s) received as well as Form 1444-C if possible.</b>		\$ _____	\$ _____
<b>Advanced Child Tax Credit Payments:</b>			
If you or your spouse received any advanced child tax credit payments, <b>please provide IRS Letter 6419</b> if possible and complete the schedule of deposits below based on deposit date.			
7/15/2021	\$ _____	8/15/2021	\$ _____
9/15/2021	\$ _____	10/15/2021	\$ _____
11/15/2021	\$ _____	12/15/2021	\$ _____

**TAX YEAR RETURN QUESTIONS**

All questions pertain to the 2021 tax year. For any question answered "Yes", please include support.

<b>Personal Information:</b>	<b>Yes</b>	<b>No</b>
Did your marital status change?		
Can you or your spouse be claimed as a dependent by someone else?		
<b>Healthcare:</b>	<b>Yes</b>	<b>No</b>
Were you or your spouse eligible for employer-sponsored healthcare coverage?		
Were you enrolled in the Health Insurance Marketplace? <i>If yes, include Form 1095-A.</i>		
<b>Dependents:</b>	<b>Yes</b>	<b>No</b>
Were there any changes in dependents from the prior year? <i>If yes, please provide info on any new dependents including full name, date of birth and SSN on page 1.</i>		
Did you or your spouse pay for childcare while either of you worked?		
Do you have any children under age 18 with unearned income greater than \$1,100?		
Do you have any children age 18 or older (or students aged 19-23) who did not provide more than half of their cost of support with unearned income greater than \$1,100?		
Are any of your dependents required to file a tax return?		
<b>Education:</b>	<b>Yes</b>	<b>No</b>
Did you or your spouse pay any student loan interest?		
Did you, your spouse or your dependents incur any post-secondary education expenses, such as tuition?		
Did you or your spouse withdraw any amounts from an IRA or Qualified Education Savings Account to pay for higher education expenses?		
<b>Retirement or Severance:</b>	<b>Yes</b>	<b>No</b>
Did you or your spouse contribute to a Roth IRA, convert an existing IRA into a Roth IRA or roll any other distributions into a Roth IRA?		
Did you or your spouse turn age 72 and have money in an IRA or other retirement account without taking any distribution?		
If you are aged 72 or more, did you initiate an IRA distribution directly from the IRA trustee to a church or qualified organization (which can be excluded from income)?		
Are you or your spouse covered by an employer retirement plan?		
Did you or your spouse retire or change jobs?		

<b>Return Delivery and Processing:</b>	<b>Yes</b>	<b>No</b>
Upon completion, we can email a secure version of your completed tax return to you if an email address is provided below. Do you wish to receive a hard copy instead or in addition to an electronic copy?		
Do you wish to receive a secure electronic version of your completed tax return via email? <i>If yes, please provide a preferred email address: ( _____ )</i>		
<b>Banking:</b>	<b>Yes</b>	<b>No</b>
Would you like any refunds owed to you directly deposited? Name of Bank: _____ Routing Number: _____ Account Number: _____		
<b>Gifts:</b>	<b>Yes</b>	<b>No</b>
Did you or your spouse make any gifts (including birthday, holiday, anniversary, graduation, etc.) with a total value in excess of \$15,000 to an individual?		
Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?		
<b>Personal Residence, Investments &amp; Real Estate:</b>	<b>Yes</b>	<b>No</b>
Did your address change? <i>If yes, please provide the new address on page 1.</i>		
Did you or your spouse take out a home equity loan? <i>If yes, please provide the purpose.</i>		
Did you or your spouse have an outstanding home equity loan at year-end? <i>If so, provide the principal balance &amp; interest rate at the beginning &amp; end of the year.</i>		
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?		
Did you sell your home? <i>If yes, provide all closing documents and forms.</i>		
Did you sell any other investments or real estate? <i>If yes, provide supporting documentation.</i>		
<b>Foreign Matters:</b>	<b>Yes</b>	<b>No</b>
Did you or your spouse perform any work outside of the U.S. or pay any foreign tax?		
Did you or your spouse hold any money or securities in a foreign financial institution? <i>If so, please provide all information regarding the account(s).</i>		
<b>Miscellaneous:</b>	<b>Yes</b>	<b>No</b>
Did you or your spouse pay in excess of \$1,000 in any quarter, or \$2,300 during the year for domestic services performed in or around your home to individuals who could be considered household employees? <i>If so, please provide W-2's or wages support.</i>		
Were you or your spouse notified by the Internal Revenue Service or other taxing authority of any changes in prior year returns?		
Did you or your spouse sell, acquire, or exchange any virtual currencies? <i>If yes, please provide information regarding these activities.</i>		
Did you, your spouse or your dependents receive an identity protection PIN from the IRS? <i>If yes, please provide this information: ( _____ )</i>		
Did you make any out of state and/or Internet purchases for which you did not pay sales tax? <i>If yes, please provide the total amount of purchases subject to use tax. (\$ _____ )</i>		

**WAGES, SALARIES & TIPS** (Please include all W-2 forms; filling out information is optional):

Employer Name	Wages	Federal Withheld	State Withheld	State
	\$	\$	\$	

**INCOME FROM RETIREMENT** (Please include all 1099's; filling out information is optional):

Payer Name	Distribution Amount	Federal Withheld	State Withheld	State
	\$	\$	\$	

**SOCIAL SECURITY BENEFITS** (Please include all 1099's; filling out information is optional):

	Gross Benefits Received	Federal Withheld	State Withheld	Medicare Premiums
Taxpayer	\$	\$	\$	\$
Spouse				

**PASSTHROUGH INCOME** (Please include all K-1's):

Entity Name	√	Entity Name	√

**OIL & GAS PRODUCTION INCOME AND EXPENSE** (Please include all 1099's):

Payee Name/Source	Gross Income	Severance Taxes	Operating Expenses	Intangible Drilling Costs
	\$	\$	\$	\$

**STATE AND LOCAL TAX REFUNDS** (Please include all 1099's; filling out information is optional):

Source (State or City)	Tax Year	Refund Amount
		\$



**PROFIT OR LOSS FROM BUSINESS/FARMING – SCHEDULE C OR F** (Please include all 1099's):

<b>Name of Business/Farm:</b>	
<b>Principal Product/Service:</b>	<b>Tax ID #:</b>
<b>Business/Farm Income</b> (List Below):	<b>Amount</b>
Gross Receipts or Sales (Products, Services, Produce, Livestock, Etc.)	\$
Cooperative Distributions and/or Agricultural Program Payments	
Other (Describe):	
<b>Cost of Goods Sold</b> (List Below):	<b>Amount</b>
Cost of Labor	\$
Purchases and Materials	
Other (Describe):	
<b>Business/Farm Expenses</b> (List Below):	<b>Amount</b>
Advertising	\$
Auto Expenses (Business Mileage: _____ x \$0.56)	
Commissions and Fees	
Contract Labor	
Employee Benefit Programs	
Insurance (Other than Health)	
Interest Expense	
Legal and Professional Services	
Office Expenses	
Pension and Profit-Sharing Plans	
Rent or Lease Expense	
Repairs and Maintenance	
Supplies	
Taxes and Licenses	
Travel (Hotel, Airfare, Parking, Etc.)	
Meals	
Utilities	
Wages (Please include W-2s)	
Dues and Subscriptions	
Chemicals	
Feed Purchased	
Fertilizers and Lime	
Freight and Trucking	
Gasoline, Fuel and Oil	
Seeds and Plants Purchased	
Storage and Warehousing	
Veterinary, Breeding and Medicine	
Other (Describe):	

**Listing of Significant Purchases for Business or Farming Use (Greater than \$2,500):**

Description of Property	Date Purchased	Cost
		\$

**INCOME OR LOSS FROM RENTAL ACTIVITY – SCHEDULE E** (Please include all 1099's):

<b>Property Address:</b>	
<b>Rental Income (List Below):</b>	<b>Amount</b>
Gross Rent Received	\$
Other (Describe):	
<b>Rental Expenses (List Below):</b>	<b>Amount</b>
Advertising	\$
Auto Expenses (Business Mileage: _____ x \$0.56)	
Cleaning and Maintenance	
Commissions	
Insurance	
Legal and Other Professional Fees	
Management Fees	
Mortgage Interest Paid (Include Form 1098)	
Repairs	
Supplies	
Taxes	
Utilities	
Association Dues	
Other (Describe):	

**Listing of Significant Purchases for Rental Real Estate (Greater than \$2,500):**

Description of Property	Date Purchased	Cost
		\$

<b>Rental Information</b>	
How many days was the property rented at fair market rate?	
How many days was the property used personally (including use by family members)?	

**OTHER SOURCES OF INCOME** (Please include all 1099's or supporting documentation):

Payer Name and/or Nature & Source (List any other items and amounts below)	Amount	Federal Withheld	State Withheld	State
Unemployment Income (Form 1099-G)	\$	\$	\$	
Taxable Alimony Received				
Jury Duty Pay				
Gambling Income (Form W-2G)				
Cancellation of Debt (1099-C)				
Other (Describe):				







**TAX PLANNING CONSIDERATIONS FOR TAX YEAR 2022**

Do you expect any of the following to occur in 2022? (If yes, please explain below.)	Yes	No
A change in marital status		
A change in dependents		
A substantial change in income		
A substantial change in withholding		
A substantial change in deductions		
A change in employment		
Starting to draw social security benefits and/or retirement income		
<b>Please include any other planning considerations or information for the 2022 tax year.</b>		