

INFORMATION ORGANIZER 20				
Taxpayer Name:	DOB:	Phone:		
Address:		 SSN:		
Spouse Name:	DOB:	Phone:		
		_ SSN:		
E-Mail:		_		
	Dependents			
Dependent Name Bi	rthday Social Security Number	Months i	Months in Home	
1)				
2) 3)				
3)				
	College Credits			
Bring your Tuition Statement (1098-T) and	I any receipts for expenses not shown on yo	ur 1098-T.		
	Child Cana Coadia			
	Child Care Credit	5/A/ A/ A//	, ,	
	provider. Statement must include providers l	EIN, Name, Address,	, and amount	
paid in 2021.				
	Medical and Dental			
Health Insurance Premiums:	Number of Medical Miles:			
Long-Term Care Premiums:	Drugs & Prescriptions:			
Long Term care Fremians.	brags & rescriptions.			
Taxes Paid	Estimated	Estimated Tax Payments		
Property Taxes Home:	Date Paid	Federal	State	
Property Taxes Vacation:				
Back Year State:	2)			
Back Year Federal:	3)			
Vehicle Tax:	4)			
	<u> </u>			
Interest Paid	Charitable	Charitable Contributions		
(Bring 1098 Statement)	(Brin	(Bring Receipts)		
1st Home Mortgage:	Non-Cash Donations:			
2nd Home Mortgage:	Cash Donations:			
Student Loan Interest:	Charitable Miles:			
Points Paid:	Hurricane Contributions:			
	Other Issues			
Foreign Bank Accounts? (Y/N)	Crypto Transactions? (Y/N)			

Miscellaneous Items (Bring Receipts)				
Alimony Paid	Gambling Losses:			
Educator Expenses:	Energy Credit:			
SEP Contributions:	(solar, wind, geothermal, and fuel cell)			
	_			
Health Insur	ance Marketplace Statement			
	ease bring in 1095-A			
Miscellaneous Income				
Alimony Received:	IRA Payments:	(Self)		
Debt Discharge:		(Spouse)		
Gambling Income:	 IRA Withdrawals:	(Self)		
Unemployment:		(Spouse)		
Federal Refunds:	 Roth Conversion:	(Spouse)		
State Refunds:	Pension & Annuity:	<u></u>		
Tax Exempt Interest:	Social Security:	<u></u>		
Tux Exempt interest.				
Don't for	get to bring in these forms			
N/ 2	1098-T			
W-2 1099-R		-		
1099-K	1095-A,B,C Schedule K-1	-		
1099-NV				
1099-B	(From 1065, 1120S, 1041) Annual Brokerage Statements			
1099-MISC				
1099	1098-Mortgage Interest Closing Documents for Real Estate			
1099	closing Documents for Real Estate			
Notes:				