

2021 TAX ORGANIZER

PLEASE COMPLETE AND DELIVER THIS WITH YOUR 2021 TAX DOCUMENTS

**** PLEASE INDICATE BELOW ALL NAMES AS THEY CURRENTLY APPEAR ON U.S. ISSUED SOCIAL SECURITY CARD**

Taxpayer:	SSN:	DOB:
Spouse:	SSN:	DOB:
Taxpayer Occupation:		Spouse Occupation:
Address:	Phone:	Text? Y N
	Phone:	Text? Y N
E-mail:	E-mail:	
Dependent Information (use page 3 if more than 5 dependents):		
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:

PART I: Please indicate "Y" or "N" & provide documentation and/or use page 3 for further explanation:

<input type="checkbox"/> Are you/spouse/dependents citizens of the United States? If no, please explain for each person on page 3. <input type="checkbox"/> Can you be claimed as a dependent on another's tax return? <input type="checkbox"/> Did you have a change of marital status? <input type="checkbox"/> Did you gift cash or property in 2021? <input type="checkbox"/> Did you receive an early retirement distribution in 2020 due to Covid? If so we need to know if you chose to pay tax over three years, opted out, or paid all or some back. <input type="checkbox"/> Do you have dependents that need to file a tax return? <input type="checkbox"/> Did you pay for child care while working, looking for work, or while a full time student?	<input type="checkbox"/> Did you provide over half of the support for any person(s) other than your dependent children in 2021? <input type="checkbox"/> Did you and/or your spouse file bankruptcy in 2021? <input type="checkbox"/> Did you have debt-forgiveness in 2021? <input type="checkbox"/> Did you sell your personal residence or other real estate? <input type="checkbox"/> Have you received a PTIN from IRS in lieu of your SSN due to identity fraud? If so please include this. <input type="checkbox"/> Do you pay expenses related to the adoption of a child? <input type="checkbox"/> Did you surrender any life insurance policies in 2021? <input type="checkbox"/> Did you receive an inheritance or legal settlement in 2021? <input type="checkbox"/> Have you received notice or are you currently under Federal, State or Local examination or audit?
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PART II: Please indicate the QUANTITY of the following source document forms delivered to our office:

<input type="checkbox"/> Form (s) W-2 <input type="checkbox"/> Form (s) 1099 for interest, dividends & stock transactions <input type="checkbox"/> Form (s) SSA-1099 for Social Security or Disability benefits <input type="checkbox"/> Form (s) 1099-R for pension or retirement distributions <input type="checkbox"/> Form (s) 1098 for mortgage interest <input type="checkbox"/> Form (s) K-1 from Partnerships, S-Corporations, or Trusts <input type="checkbox"/> Form (s) 1098-T Tuition Statement <input type="checkbox"/> Form (s) 1099G Unemployment or State refund	<input type="checkbox"/> Form (s) W-2G gambling winnings <input type="checkbox"/> Form (s) 1099 Miscellaneous income <input type="checkbox"/> Form (s) 1099S sale of real estate <input type="checkbox"/> Form (s) 1099K (Merchant Card & Third Party Payments) <input type="checkbox"/> Form (s) 1098E for student loan interest <input type="checkbox"/> Form (s) 1099C or 1099A cancellation or acquisition of debt <input type="checkbox"/> Form (s) 1095 A, B or C for healthcare information <input type="checkbox"/> Other: _____
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PART III: Indicate Amount and/or provide documentation if Applicable

Individual IRA account contributions for 2021 self \$ _____ spouse \$ _____
Roth IRA Contributions for 2021 self \$ _____ spouse \$ _____
\$ _____ Are you a teacher, how much did you spend on classroom supplies (incl. Covid-related supplies)
\$ _____ Personal property tax amounts paid in 2021 (taxes paid on automobiles, boats, etc.)
\$ _____ Real estate tax amounts paid in 2021
\$ _____ Alimony Received or Paid in 2021 (provide copy of divorce decree unless we already have it)
\$ _____ Gambling losses (remember to keep receipts)
\$ _____ Out-of-pocket medical expenses _____ Self-paid health insurance premiums
\$ _____ Tuition paid in 2021 (even if paid by a loan) - Must provide 1098T forms(s)
\$ _____ Course-related books, supplies and equipment & for which student(s) must have for classes
\$ _____ Charitable contributions - **non-cash** (include the amount on the receipt or notation); if over \$500 total for all charities,
we must report details (i.e. date, charity, address, description of goods, and amounts) -please provide detailed receipts
\$ _____ Charitable contributions - cash (remember to keep receipts)
\$ _____ Child care expense information - will need statement from provider and amount for each child

PART IV: Stimulus Payments and Advanced Child Tax Credits

\$ _____ Amount of the last Payment Received from CAA Act (maximum of 1,400 per person - early 2021)
JULY \$ _____ Payments Received for Advance Child Tax Credit - based on how many Children _____
AUG \$ _____
SEPT \$ _____ ***** If any of the information here is not correct it will directly impact your tax liability**
OCT \$ _____ **and/or refund. If you received a form 1444-C from IRS please provide this documentation**
NOV \$ _____ **and/or verify the amount of payments received with your bank.**
DEC \$ _____

PART V: Investment Accounts

yes no Did you or your spouse receive, sell, send, exchange or otherwise acquire financial interest in virtual currency?
If yes, please provide transaction details for tax reporting purposes.
 yes no Did you or your spouse receive distribution(s) from a grantor/transferor to a foreign trust?

PART VI: Foreign Assets and Accounts

Foreign Account Tax Compliance (FATCA), enacted in 2011, requires certain US Taxpayers holding foreign financial assets in an aggregate value exceeding \$50,000USD to report information about those assets on Form 8938. This form must be attached to the taxpayer's annual tax return. Failure to report foreign financial assets will result in a penalty of \$10,000 per year.

FinCen Form 114a is required if a person or entity has a financial interest in or signatory authority over one or more accounts in a foreign country and that the aggregate value exceeds \$10,000USD at any time during the calendar year. This applies to US citizens, US residents and domestic entities. Willful failure to file FinCEN can be as high as \$100,000 or 50% of the total value of the accounts per violation.

yes no Did you or your spouse have foreign accounts or assets during 2021 as described above?

PART V: Child Tax and Earned Income (EIC) Credits:

These Tax Credits are based on dependent relationship and residency. You will be required to attest to your tax preparer that you are eligible to claim dependents as indicated, and must provide us with proof of residency/custody from the options below:

- * School or medical record
- * Child care provider statement
- * Health care provider statement
- * Form 8332 Release of Exemption

**Include one or more of these documents, or acceptable equivalent, with your 2021 tax documents*

PART VI: Other Information:

TAX RETURNS FOR 2021 WILL BE E-FILED. PLEASE CHOOSE AN OPTION FOR YOUR TAX REFUND OR PAYMENT:

OPTION ONE: HERE IS MY BANK INFORMATION - PLEASE ALLOW REFUNDS TO BE DIRECTLY DEPOSITED INTO MY ACCOUNT. IF I OWE TAX, IT WILL NOT BE TAKEN FROM MY ACCOUNT. I UNDERSTAND I WILL NEED TO MAIL PAYMENTS WITH THE VOUCHERS PROVIDED.

NAME OF BANK: _____ ROUTING NUMBER: _____
BANK ACCT TYPE (PLEASE CIRCLE): SAVINGS CHECKING BANK ACCT NUMBER: _____

OPTION TWO: I WOULD LIKE TO RECEIVE MY REFUND BY MAIL AND WILL ALSO MAIL PAYMENTS DUE WITH THE VOUCHERS PROVIDED.

PLEASE NOTE: IF YOUR TAX RETURN CANNOT BE TRANSMITTED ELECTRONICALLY, YOU WILL BE RESPONSIBLE FOR SENDING AND PAYING VIA U.S. MAIL.

DELIVERY OF TAX RETURNS: Electronic delivery via Confidential Client Portal Paper Copy to be Picked Up

OTHER TAX PAYMENTS:

F=	S=	Overpayments applied from previous years
F=	S=	Date= Estimated tax payments - 1st quarter
F=	S=	Date= Estimated tax payments - 2nd quarter
F=	S=	Date= Estimated tax payments - 3rd quarter
F=	S=	Date= Estimated tax payments - 4th quarter
F=	S=	Date= Estimated tax payment with extension by 4/15/21

KCMO= _____ Date= _____ If you believe you might owe local tax but cannot file by 4/15, we recommend you request an extension form from us or go online to kcmo.gov. This needs to be received by KCMO no later than 4/15/21 to avoid penalty for late payment.

Any questions or anything unique to your tax situation that is NOT listed above, or needs explanation, please indicate: _____

Taxpayer Signature: _____ Date: _____