

2021 Tax Organizer

ORGO

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2021 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2021 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2020 information is included for your reference. You do not need to make any 2020 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- A copy of your 2020 tax return (if not in our possession).
- Original Form(s) W-2.
- Schedule(s) K-1 and K-3 showing income or loss from partnerships, S corporations or estates or trusts.
- Copies of other compensation or pension documentation, such as Form 1099-MISC, Form 1099-R, or Form 1099-NEC.
- Form(s) 1099 or statements reporting dividend and interest income.
- Brokerage statements showing transactions for stocks, bonds, etc.
- Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- Copies of closing statements regarding the sale or purchase of real property.
- All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

2021 TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name		Last name.....	
First name		First name	
Middle Initial.....	Suffix.....	Middle Initial.....	Suffix.....
Social security number		Social security number	
Occupation		Occupation.....	
Work phone	Ext ...	Work phone.....	Ext ...
Cell phone.....		Cell phone	
E-mail address.....		E-mail address.....	
Date of birth.....		Date of birth	
Address		Apartment number.....	
City	State.....	ZIP Code.....	
Home phone.....	Fax number		

Dependent Information						
First name	MI	Social Security Number	Date of Birth	Months Lived with Taxpayer	Child Care Expense	
Last name	Suffix	Relationship				

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

Education Tuition and Fees
Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid
Enter total 2021 qualified student loan interest.....

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation	
Employer Name	2020 Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc	
1099-R Payer Name	2020 Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits		Taxpayer	Spouse
Social Security Benefits from Form SSA-1099	_____	_____	_____
Railroad Retirement Benefits from Form RRB-1099	_____	_____	_____
Medicare B premiums withheld	_____	_____	_____
Medicare C premiums withheld	_____	_____	_____
Medicare D premiums withheld	_____	_____	_____

Attach Form(s) 1099-MISC – Miscellaneous Income and 1099-NEC	
1099-MISC Payer Name and 1099-NEC Payer Name	

Attach Form(s) 1099-INT – Interest Income	
1099-INT Payer Name	2020 Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV – Dividend Income	
1099-DIV Payer Name	2020 Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc
 Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:
 Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:
 Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions		Taxpayer	Spouse
Traditional IRA contributions made for 2021	_____	_____	_____
Roth IRA contributions made for 2021	_____	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____	_____

2021 Deductions

Medical and Dental Expenses	2021 Amount	2020 Amount
Prescription medications	_____	_____
Health insurance premiums	_____	_____
Doctors, dentists, etc	_____	_____
Hospitals, clinics, etc	_____	_____
Eyeglasses and contact lenses	_____	_____
Miles driven for medical purposes	_____	_____
Other medical and dental expenses: _____	_____	_____

Taxes	2021 Amount	2020 Amount
Real estate taxes paid on principal residence	_____	_____
Real estate taxes paid on additional homes or land	_____	_____
Auto license registration fees based on the value of the vehicle	_____	_____
Other personal property taxes	_____	_____

Interest Expenses	2021 Amount	2020 Amount
Home mortgage interest paid — Attach Form(s) 1098.		
Lender's Name	2021 Amount	2020 Amount
_____	_____	_____
Points paid on loan to buy, build or improve main home		
Lender's Name	2021 Amount	
_____	_____	

Cash/Check/Credit Contributions	2021 Amount	2020 Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____

Noncash Charitable Contributions
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Yes No

- 1 Did you receive an Economic Impact (Stimulus) Payment? Yes No
If yes, how much did you receive?
- 2 Did you receive any Advanced Child Tax Credit payments? Yes No
If yes, how much did you receive?
- 3 Did a lender cancel any of your debt in 2021? (Attach any Forms 1099-A or 1099-C) Yes No
- 4 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2021? If yes, please attach details. Yes No
- 5 Did you purchase a motor vehicle or boat during 2021? Yes No
If yes, attach documentation showing sales tax paid.
- 6 Did you purchase a hybrid or electric vehicle in 2021? If yes, enter year, make, model, and date purchased: Yes No
- 7 Did you donate a vehicle in 2021? If yes, attach Form 1098C. Yes No
- 8 What was the sales tax rate in your locality in 2021? _____ % State ID _____ Yes No
- 9 Did your marital status change during 2021? Yes No
If yes, explain:
- 10 Were you or your spouse permanently and totally disabled in 2021? Yes No
- 11 Do you have dependents who must file? Yes No
- 12 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,200? Yes No
- 13 Did you provide over half the support for any other person during 2021? Yes No
- 14 Did you incur adoption expenses during 2021? Yes No
- 15 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
- 16 Did you receive any disability payments in 2021? Yes No
- 17 Did you receive tip income not reported to your employer? Yes No
- 18 Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2021? If yes, attach closing or escrow statements, 1099-C or 1099-A forms. Yes No
a b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it? Yes No
- 19 Did you incur any casualty or theft losses during 2021? Yes No
- 20 Did you incur any non-business bad debts? Yes No
- 21 Did you pay any individual for domestic services in 2021? Yes No
- 22 Did you take a retirement account distribution related to the corona virus or a natural disaster? Yes No
- 23 Did you buy or sell any stocks or bonds in 2021? Yes No
- 24 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? Yes No
- 25 Did you incur any moving expenses? If yes, attach details. Yes No
- 26 Did you receive any income not included in this Tax Organizer? Yes No
If yes, please attach information.
- 27 Do you expect your income and deductions in 2022 to be the same as 2021? Yes No
If no, attach explanation of changes expected.
- 28 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach. Yes No
- 29 At any time during 2020, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No
- 30 a Did you obtain a Paycheck Protection Program (PPP) loan? Yes No
b If yes, has any portion of that loan been forgiven? Yes No
- 31 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____ Yes No
- 32 Enter your state of residence: _____ Taxpayer _____ Spouse _____
- 33a Do you want to change the language with which the IRS communicates with you? Yes No
b If yes, which language?

Electronic Filing and Direct Deposit of Refund Yes No

If your tax return is eligible for Electronic Filing, would you like to file electronically? Yes No

The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.
If you receive a refund, would you like direct deposit? Yes No

If yes, please provide a voided check (not a deposit slip) if your bank account information has changed.
What type of account is this? Checking Savings

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)

Business Income and Expenses

ORG19

GENERAL INFORMATION

Is this activity a qualified trade or business under Section 199A? Yes No

1 Check ownership Taxpayer Spouse Joint

2 Business name

3 a Business street address.....

b 1 City, State and Zip Code, or

2 Foreign country.....

4 Principal business/profession.....

5 Employer ID number.....

6 Business code (Preparer Use Only)

7 Was this business fully disposed of in a fully taxable transaction during 2021? Yes No

8 Accounting method:
 Cash Accrual Other (specify)

9 Method used to value closing inventory:
 Cost Lower of cost or market Other (explain)

10 Was there a change in determining quantities, costs, or valuations between opening/closing inventory?
 (If yes, attach explanation) Yes No

11 Did you materially participate in the operation of this business during 2021? Yes No

12 Did you start or acquire this business during 2021? Yes No

13 a Did you make any payments in 2021 that require you to file Forms 1099? Yes No

b If yes, did you or will you file all the required Forms 1099? Yes No

14 At-risk determination:
 a Is all of the investment in this activity at risk? Yes No

b Is some of the investment in this activity not at risk? Yes No

15 Did you have unallowed passive losses in 2020? Yes No

16 a Treat all MACRS assets for this activity as qualified Indian reservation property? Yes No

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? Regular Extension No

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? Yes No

d Was this business located in a Qualified Disaster Area? Yes No

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2021	2020
17 Gross receipts or sales.....		
18 Returns and allowances plus other adjustments.....		
19 Other income (include federal/state gas tax credit/refund)		

COST OF GOODS SOLD - IF APPLICABLE	2021	2020
20 Inventory at beginning of year		
21 Purchases		
22 Items withdrawn for personal use		
23 Cost of labor (do not include your salary)		
24 Materials and supplies		
25 Other costs		
26 Inventory at end of year.....		

Business Income and Expenses (continued)

ORG19

EXPENSES	2021	2020
Business name _____		
27 Advertising		
28 Car and truck expenses (complete ORG18).....		
29 Commissions and fees.....		
30 Contract labor		
31 Depletion		
32 Depreciation and Section 179 deduction (Preparer Use Only)		
33 Employee benefit programs:		
a Employee health insurance premiums		
b Other employee benefit programs		
34 Insurance (other than health).....		
35 Self-employed health insurance attributable to this business		
36 Interest:		
a Mortgage paid to banks not reported to you on Form 1098.....		
b Other		
37 Legal and professional services		
38 Office expenses		
39 Pension and profit-sharing plans		
40 Rent or lease:		
a Machinery and equipment (enter vehicle lease on ORG18)		
b Other business property.....		
41 Repairs and maintenance		
42 Supplies (not included in cost of goods sold)		
43 Taxes and licenses not reported to you on Form 1098		
44 Travel and meals		
a Travel.....		
b Meals subject to 50% limit.....		
c Meals subject to 80% limit.....		
d Meals not subject to limit		
45 Utilities		
46 Gross wages		
47 Other expenses:		

48 Expenses for business use of your home (Preparer Use Only)		
Complete ORG20 for Business Use of Home.		
49 Qualified pension plan start-up costs		
50 DPAD (line 6) from cooperative(s) with tax year beginning before Jan. 1, 2018.....		
51 DPAD (line 6) from cooperative(s) with tax year beginning after Dec. 31, 2017		

ORG19

Business Use of Home

ORG20

for:
copy:

Simplified method election for Home Office expenses: Elect the simplified method in **2020** instead of entering actual expenses
 Elected the simplified method in **2019** instead of entering actual expenses

GENERAL INFORMATION	2021	2020
1 Area used regularly and exclusively for business, regularly and exclusively for day care, or regularly for inventory storage (square footage)		
2 Area used only partly for day care (square footage)		
3 Total area of home (square footage)		
4 Daycare hours		
a Number of weeks used for day care, if less than full year		
b Number of days used for day care each week		
c Number of days closed for holidays, vacations, etc		
d Number of hours used for day care each day		
e Total hours used for day care		
f Total hours available for use		
5 Enter the date you began using this home office for this business		
6 If part of your income is from a place of business other than this home, enter % of gross income from business use of this home		
7 Adjustment to gain from business use of home shown on Schedule D or Form 4797 (Preparer Use Only)		
8 Adjustment to losses from this business shown on Schedule D or Form 4797 (Preparer Use Only)		

Enter expenses that benefit only your business area in the 'Direct' column and expenses that benefit your entire home in the 'Indirect' column.

EXPENSES	2021		2020	
	Direct	Indirect	Direct	Indirect
9 Casualty losses (Preparer Use Only)				
10 Total mortgage interest/points				
11 Mortgage interest/points on Form 1098				
12 Interest not on Form 1098				
13 Points not of Form 1098				
14 Real estate taxes				
15 Excess mortgage interest (Preparer Use)				
16 Excess real estate taxes (Preparer Use)				
17 Qualified mortgage insurance				
18 Other insurance				
19 Rent				
20 Repairs and maintenance				
21 Utilities				
22 Other expenses (e.g., rent)				
23 Carryover of operating expenses				
24 Excess casualty losses (Preparer Use Only)				
25 Depreciation of your home (Preparer Use Only)				
26 Carryover of excess casualty losses and depreciation				

DEPRECIATION

If your home and any additions or improvements to your home are not already listed on ORG50 for this business, please complete the following information.

26	Description	Date Acquired (MM/DD/YY)	Date Placed in Service (MM/DD/YY)	Cost (include land for residence only)
	Residence			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
27	Enter the land value included in cost for residence			

Rent and Royalty Income and Expenses

ORG25

BASIC PROPERTY INFORMATION

Property description: _____
 Property type: * _____ If type is other, enter a description: _____
 Location (street address): _____
 City: _____ State: _____ Zip: _____
 If a foreign address: Foreign province or state: _____
 Foreign postal code: _____ Foreign Country: _____

- Is this activity a qualified trade or business under Section 199A? Yes No
- 1 Check property owner Taxpayer Spouse Joint Yes No
- 2 a Did you make any payments that would require you to file Form(s) 1099? Yes No
 b If **yes**, did you or will you file all required Forms(s) 1099? Yes No
- 3 a Enter the ownership percentage (if not 100%) _____
 b If not 100%, are you reporting 100% of the income and expenses? Yes No
- 4 Is this a rental property? (If **yes**, answer questions 5 through 11; if **no**, skip to question 12.) Yes No
- 5 Did you have personal use of this property or rent it for part of the year at less than fair rental value? Yes No
- 6 For all rental properties, **enter the number of days** during 2021 that:
 a The property was rented at fair rental value _____
 b The property was used personally or rented at less than fair rental value _____
 c You owned the property, if not the entire year _____
- 7 a Does this rental have multiple living units and you live in one of the units? Yes No
 b If **yes**, enter percentage of rental use _____
- 8 Did you actively participate in this property's management during 2021? Yes No
- 9 Did you materially participate in this property's management during 2021? Yes No
- 10 Do you want to treat this property as non-passive? Yes No
- 11 Did this property have unallowed passive losses in 2020? Yes No
- 12 Did you dispose of this property in a fully taxable transaction? Yes No
- 13 Check this box if some of this investment was **not** at-risk Yes No
- 14 a Treat all MACRS assets for this activity as qualified Indian reservation property? Yes No
 b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? Regular Extension No
 c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? Yes No
 d Was this activity located in a Qualified Disaster Area? Yes No

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2021	2020
15 Rents or royalties received		
* Property Types:		
1 Single family residence		5 Land
2 Multi-family residence		6 Royalties
3 Vacation/short-term rental		7 Self-rental
4 Commercial		8 Other

Rent and Royalty Income and Expenses (continued)

ORG25

EXPENSES	2021	2020
Property location		
16 Advertising		
17a Automobile (complete ORG18 for autos).....		
b Travel.....		
18 Cleaning and maintenance		
19 Commissions.....		
20a Mortgage insurance premiums – qualified		
b Other insurance		
21 Legal and professional fees		
22 Management fees		
23a Mortgage interest paid to banks – qualified.....		
b Mortgage interest paid to banks – other		
24 Other interest		
25 Repairs.....		
26 Supplies.....		
27a Real estate taxes.....		
b Other taxes		
28 Utilities		
29 Other expenses:		
a		
b		
c		
d		
e		
30a Depreciation and Section 179 deduction (Preparer Use Only).....		
b Depletion (Preparer Use Only).....		