11					
21	1040	US	Tax Organizer		
	a g	Pleas overnmer	se enter all pertinent 2021 int nt form for an item, check th	formation. If you have attached e box and do not enter a 2021 am	nount.
	GES, SALAR oyer name:	RIES AND	TIPS	2021 Amount	2020 Amount
				Attach Forms W-2	
INTE	EREST INCC	ME			
Payer	name:				
				Attach Forms 1099-INT	
	DEND INCO	ME			
				Attach Forms 1099-DIV	
	SIONS, IRA	AND GAN	MBLING INCOME		
] .					
				Attach Forms 1099-R & W-2G	
			<i>J-</i> 2G	1099-R & W-2G	
	Total gambling	losses		1099-R & W-2G	
ОТН	Total gambling ER GOVERI Form 1099-B - Form 1099-MIS Form 1099-K -	NMENT FO Sales of sto SC - Miscella Merchant ca		1099-R & W-2G	ms 1099
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OTH	Form 1099-G - Form 1099-A/S	NMENT FO Sales of sto SC - Miscella Merchant ca Sales of rea State tax re 9 - Social se Unemploym (29 Plan)	ORMS - INCOME ck (also include transaction history) neous income ird and third party network payments I estate (also include closing statem	Attach Forms 1099 Attach Forms 1099 Attach Forms 1099	ms 1099

ORGANIZER Page 2021 1040 US Tax Organizer MISCELLANEOUS INCOME Taxpayer: Alimony received Spouse: Alimony received Other: RETIREMENT PLAN CONTRIBUTIONS 2021 Amount 2020 Amount Taxpayer: Traditional IRA contributions (1=maximum)..... Roth IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) Spouse: Roth IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) OTHER GOVERNMENT FORMS - DEDUCTIONS Attach Forms 1098 AFFORDABLE CARE ACT Form 1095-A - Health Insurance Marketplace Statement Attach Forms 1095 Form 1095- B - Health Coverage Form 1095-C - Employer-Provided Health Insurance Offer and Coverage ADJUSTMENTS TO INCOME Taxpayer: Educator expenses..... Other adjustments to income: Spouse: Educator expenses... Other adjustments to income: MEDICAL AND DENTAL EXPENSES Prescription medicines and drugs Doctors, dentists and nurses..... Insurance premiums..... Insurance reimbursement..... Number of medical miles..... Other: TAXES PAID State income taxes - 1/21 payment on 2020 state estimate

ORGANIZER 2021 1040 US Tax Organizer TAXES PAID (continued) 2021 Amount 2020 Amount State income taxes - paid with 2020 state extension State income taxes - paid with 2020 state return State income taxes - paid for prior years and/or to other states City/local income taxes - 1/21 payment on 2020 city/local estimate City/local income taxes - paid with 2020 city/local extension City/local income taxes - paid with 2020 city/local return State and local sales taxes (except autos and special items) Use taxes paid on 2021 purchases Use taxes paid on 2020 state return Sales tax on autos not included above... Sales taxes paid on boats, aircraft, and other special items Foreign income taxes..... Attach Tax Notice Personal property taxes (including automobile fees in some states) INTEREST PAID Home mortgage interest and points paid: Attach Forms 1098 Home mortgage interest not on Form 1098 (include name, SSN, & address of payee): Points not reported on Form 1098: Investment interest (interest on margin accounts): Passive interest..... CASH CONTRIBUTIONS NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s) Volunteer expenses (out-of-pocket)..... Number of charitable miles..... NONCASH CONTRIBUTIONS NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied. MISCELLANEOUS DEDUCTIONS Tax return preparation fee..... Safe deposit box rental..... Investment expenses. Estate tax, section 691(c)..... Unreimbursed employee expenses: Other:

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2021	1040	US	Miscellaneous Questions				
If any of the following items pertain to you or your spouse for 2021, please check the appropriate box and provide additional information if necessary.							
YES	NO	Did your r	marital status change during the year?				
		Did your address change during the year?					
		Could you be claimed as a dependent on another person's tax return?					
		Were there any changes in dependents?					
		Did you and your dependents have health care coverage for the full-year?					
		Did you receive an IRS document 1095-A (Health Insurance Marketplace Statement)? If so, please attach.					
		Did you receive unreported tip income of \$20 or more in any month?					
		Did you receive any disability income?					
		Did you buy or sell any stocks, bonds or other investment property?					
		Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?					
		Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?					
		Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?					
		Did you transfer or rollover any amount from one retirement plan to another?					
		Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?					
		Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?					
			ncur a loss because of damaged or stolen property?				
		Did you u	se your car on the job (other than to and from work)?				
		May the I	RS discuss your tax return with your preparer?				
		Was your	home rented out or used for business?				
		Were you	notified or audited by either the IRS or the State taxing agency?				
		Did you re	eceive an economic impact payment? If so, how much?				