TOM UMSTATTD CPA
Endeavoring Conscientiously Toward Superior Service

Certified Public Accountant
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2020 Income Tax Organizer

Taxpayer

Name: ____________________ Date of Birth: ____________________

Occupation: ____________________ Social Security #: ____________________

E-Mail Address: ____________________ Primary Phone #: ____________________

Spouse

Name: ____________________ Date of Birth: ____________________

Occupation: ____________________ Social Security #: ____________________

E-Mail Address: ____________________ Primary Phone #: ____________________

Home Address

Street Address: ____________________

Street Address Line 2: ____________________

Zip Code: ____________________

City, State: ____________________

Mailing Address

Street Address: ____________________

Street Address Line 2: ____________________

Zip Code: ____________________

City, State: ____________________

Dependents:

If different from last year's return, please give the following information for each dependent. Also, if your dependent filed a tax return, please attach a copy of their return. *(Note: you must have a SSN for each dependent.)*

Name: ____________________ Date of Birth: ____________ SSN: ____________

Relationship: ____________ Income[2]: ____________ # of Months in home during 2020: ____________

Name: ____________________ Date of Birth: ____________ SSN: ____________

Relationship: ____________ Income[2]: ____________ # of Months in home during 2020: ____________

Name: ____________________ Date of Birth: ____________ SSN: ____________

Relationship: ____________ Income[2]: ____________ # of Months in home during 2020: ____________

Indicate source of income (wages, interest, etc.) Attach supporting documents (Forms W-2, 1099, etc.) If you did **NOT** provide more than 50% of each dependent's support, please give details.

Refunds:

If you get a tax refund, would you like Direct Deposit from the IRS? Yes: ____ No: ____

If yes: Routing #: ____________ Account #: ____________ Checking ___ Savings ___

PLEASE CHECK THE BOXES AND FILL OUT THE INFORMATION THAT IS RELEVANT TO YOUR SITUATION. ATTACH SUPPORTING DOCUMENTS AS REQUESTED AND COPIES OF ALL IRS CORRESPONDENCE. NEW CLIENTS SHOULD PROVIDE COPIES OF THE LAST 3 YEARS TAX RETURNS SO WE MAY BETTER UNDERSTAND YOUR TAX SITUATION. IF YOU OWN A TRADE OR BUSINESS, PLEASE FILL OUT THE BUSINESS TAX ORGANIZER.

A. INCOME

1.) ____ How many W-2's did you receive in 2020?	**2.) ____ Did you receive interest or dividends**? Attach Forms 1099-INT or 1099-DIV.
3.) ____ Did you receive income from self-employment? (For example, as an independent contractor or from running your own business). Attach any Forms **1099-MISC** you received and fill out the Business tax organizer.	**4.) ____ Did you sell stock or other securities?** Attach broker's statements.
5.) ____ Did you sell land, property, or other assets held for investment? Attach sales documents, including HUD-1s, 1099-S, etc.	**6.) ____ Did you receive retirement income?** (For example, distributions from 401Ks, IRAs, or pensions). Attach any 1099-Rs.
7.) ____ Did you rollover or distribute any retirement funds? (For example, from 401Ks or IRAs).	**8.) ____ Did you receive rental income?** Attach statement(s) of rental income and expense and any Forms 1099-MISC.
9.) ____ Did you receive royalties? Attach any Forms 1099-MISC.	**10.) ____ Did you received any Forms K-1 from partnerships, S-corporations, trusts, or estates?** Attach Forms K-1.
11.) ____ Did you have income or loss from a farm or ranch? Attach statement(s) of income and expense.	**12.) ____ Did you receive unemployment compensation?(1099-G)**
13.) ____ Did you receive Social Security benefits? Attach Form(s) SSA-1099.	**14.) ____ Did you have any loans between you and a business you own?**
15.) ____ At any time during 2019, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? (Bitcoin, Ethereum, Litecoin, Etc…)	**16.) ____ Did you receive income from foreign sources?**

17.) ____ Did you receive cash or other property you believe is non-taxable, such as:

a. ____ Interest on municipal bonds?

b. ____ Cash for services, products, or rentals?

c. ____ Gifts or inheritances?

d. ____ Property received in a like-kind exchange (for example, Section 1031 exchange)

e. ____ Property received in a barter transaction?

f. ____ Other? Please describe:

18.) **Please list any other income you received, not listed above:**

____

____

____

____

B. GENERAL EXPENSES

19.) ____ Did you make contributions to a **Medical** or **Health Savings Account? _____ MSA _____ HSA.**
Were distributions used only for medical expenses?: Yes: ____ No: ____

20.) ____ Did you make contributions to a retirement account(s)? (For example, 401K, IRA, SEP, etc.)

21.) ____ Did you give gifts in excess of $15,000 to any one person?

22.) ____ Did you have any medical or dental expenses that were not reimbursed by insurance?

23.) ____ Did you pay state or local taxes? (e.g. property tax, boat or RV tax, etc.)? (Note: this does *not* include Texas car registrations.)

24.) ____ Did you pay mortgage interest on your primary residence and/or second home or RV (including home equity loan)? Attach Form 1098**.**

25.) ____ Did you make cash donations to a charitable organization?

26.) ____ Did you make non-cash donations to a charitable organization?

27.) ____ Did you have any casualty or theft losses in federally declared disaster areas?

28.) ____ Did you have any non-business bad debts?

29.) ____ Did you pay for dependent care services so you could be employed or a full-time student?

30.) ____ Did you pay or receive alimony?

31.) ____ Did you make any estimated tax payments? Give dates and amounts:

Date: ________ Amount: __________ Date: ________ Amount: __________
Date: ________ Amount: __________ Date: ________ Amount: __________

Additional Information you would like for us to know:

____
____
____
____
____
____
____

D. EDUCATION:

32.) ____ Did you or your dependents have costs for higher education? (For example, college, continuing education, etc.) Attach Form 1098-T.	**33.) ____ Did you or your dependents pay student loan interest?** Attach Form 1098-E.
34.) ____ Did you or your dependents receive any scholarships or grants?	**35.) ____ Do you or your spouse or dependents have a Coverdell ESA or Section 529 plan?**

E. OTHER:

36.) ____ Did you sell your home in 2020? Attach settlement statements **(**HUD-1s**)** for the sale, and for when you originally bought the home.	
37.) ____ Did you purchase your home in 2020? Attach settlement statement (HUD-1).	**38.) ____ Do you have any foreign bank accounts of $10,000 or more?**
39.) ____ Did you make any charitable contributions paid directly from your IRA?	**40.) _____ Did you pay sales tax on large purchases (car, boat, RV, etc.)?** Amount of sales tax paid: $_________
41.) ____ Do you and your spouse both have a written will? Date last reviewed: ______________________	**42.) ____ Please explain to us how you are planning for retirement.** ______________________________________
43.) ____ Have you considered non-qualified plan options for retirement? Please explain.	**44.) ____ Do you have a plan for gifting your wealth to reduce estate taxes? Please explain.**
45.) Did you receive a Covid related distribution from an IRA that was $100,000, or less in 2020? **Yes___ No___**	**46.) If so, do you intend to: ___keep the money ___pay it back.**

Privacy Policy

CPAs are bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

Types of Non-Public Personal Information We Collect
We will collect non-public personal information about you. This is information you may provide to us or we may acquire from third parties with your authorization.

Parties to Whom We Disclose Information
For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, with your consent, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of the information being shared.

Protecting the Confidentiality and Security of Current and Former Clients' Information
We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your non-public personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.