

2020 Individual Organizer

Personal organizer available upon request

PERSONAL DATA

Taxpayer Name #1:		Taxpayer Name #2:	
Address:			
Social Security #:		Social Security #:	
Date of Birth:		Date of Birth:	
Daytime Phone:		Daytime Phone:	
Evening Phone:		Evening Phone:	
Email:		Email:	
Please circle the best time of day to contact: (Morning, Afternoon, Evening)		M	A E

DEPENDENT INFORMATION - Documentation proof required

Name of Dependent	Date of Birth	Social Security #	Relationship	Months lived in your home	Did you provide over 1/2 support?	Wage & Investment Income

PLEASE PROVIDE DRIVER'S LICENSE INFORMATION

Taxpayer #1	State:	No:	Issue Date:	Expiration Date:
Taxpayer #2	State:	No:	Issue Date:	Expiration Date:

2020 Impact Questions

How much Economic Impact (stimulus) money did you receive 1st round (2020)?	\$
How much Economic Impact (stimulus) money did you receive 2nd round (2021)?	\$
How much did you donate to a non-profit organization. In 2020 you can deduct up to \$300 without itemizing.	\$
Did you receive interest by the IRS or any state because they were slow getting you your refund? If so, please provide the	\$
Did you have insurance thru Marketplace? Please circle. If yes, submit form 8962 with your tax documents.	Yes No
At any time during 2020 were you involved in the purchasing or selling of virtual currency. Please circle and provide documents	Yes No
Were you self employed, including a farmer that was unable to work because of COVID-19? (This includes unable to work because a family member was sick with COVID-19). Please describe the situation:	

PLEASE PROVIDE ALL INCOME FORMS - SEE ATTACHED SHEET

INCOME (for which you did NOT receive a Form W2, 1099, or K-1)

OTHER INCOME (could include virtual currency, Uber, Lyft, Airbnb, Gambling, etc.)

Interest, Dividends, Sale of Real Estate, Alimony, Tips, Commissions

Payer	Amount	Payer	Amount
	\$		\$
	\$		\$

CANCELLATION OF DEBT

Did you have any loans or credit card debt cancelled or forgiven in 2020? If so, please provide all related paper work

Taxpayer signature

[illegible]