

Tax Organizer for 2021

■ PERSONAL INFORMATION				
Taxpayer's name	Spouse's name			
<i>Check here if no change to your contact info in 2021:</i>			<i>Check here if no change to your contact info in 2021:</i>	
Date of birth	Date of birth			
<input type="checkbox"/> Single <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately	Date of move to current home, if in 2021			
Address/city/state/zip				
Occupation	Spouse occupation			
Mobile telephone	Spouse mobile telephone			
E-mail	Spouse e-mail			

Please check the box to indicate your response to the following questions:

	YES	NO		YES	NO
Do you want to opt out of electronic banking?			Did you or your spouse put money into an IRA for 2021?		
If not, do you want direct deposit of any refund?			Did you contribute to a 529 college savings plan that you own?		
If not, Do you want to pay any tax due by debit?			Did you pay an organization or business for childcare so that you & spouse could work full-time?		
Did you move in 2021?			Do you have any foreign financial accounts?		
Did you have child or begin the adoption process in 2021?			Did you buy, sell or have any transactions with cryptocurrency?		
Did you married or divorce in 2021?			Did you make estimated tax payments (not withholding)?		
Did you or your spouse have Long Term Care insurance?			Did you sell real estate or collectibles? (Art, jewelry, etc)		
Do you have state-issued ID?			Did you have very high unreimbursed medical expenses?		
Did you receive the third Economic Impact Payment in 2021?			Did you contribute money to a charitable organization?		
Amount received : _____			Amount : _____		
Did you pay student loan interest in 2021?			Did you contribute things to a charitable organization?		
Do you own real estate?			Did you receive Advance Child Tax Credit payments in 2021?		
Did you/your family have health insurance purchased on the Healthcare Exchange? Provide form 1095-A					
Did you/spouse/children pay college tuition in 2021?					