

2020 Individual Taxpayer Organizer

Steadman Tax Services, LLC
 3000 Joe DiMaggio Blvd Suite 58
 Round Rock, TX 78665
 512.535.7332 (Voice) 512.275.6237 (Fax)
 www.steadmantax.com

Please complete all sections of the organizers so we can ensure we have current information , even if there is no change.

Taxpayer				SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	Email	IP PIN	
Occupation			Date of birth MM/DD/YY	Are you new to our firm? Yes No	
Address			City	State	Zip
County			Home phone		Work or cell
Driver's License	No.	State		Issue Date	Exp. Date

Spouse				SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	Email	IP PIN	
Occupation			Date of birth MM/DD/YY	Are you new to our firm? Yes No	
Address <small>(If different from Taxpayer)</small>			City	State	Zip
County			Home phone		Work or cell
Driver's License	No.	State		Issue Date	Exp. Date

Do you have an IRS Identity Protection PIN as a result of Identity Theft? Yes No Do you rent or own your home? Own or Rent

If you moved during 2020, enter your previous address. Date of move

State information: States of residence during 2020 and dates ____ From ____ to ____ MM/DD/YY

School district County

Marital status at 12/31/2020 Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure

Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No

Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.

Have you received any notice from the IRS or state revenue department within the past year? Yes No

Names of dependent children <small>Child's full name</small>	Social Security #	IP PIN	Date of birth MM/DD/YY	Months lived in home in 2020	Relationship	College student?

Other dependents or people who lived with you	Social Security #	IP PIN	Date of birth MM/DD/YY	Months lived in home in 2020	Relationship	Income

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2020? Yes No

Do any of the children have a disability? Yes No

Did any of the children have any income above \$1,100 for the year? Yes No

Questions - All Taxpayers (Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse - enter "?" If unsure about a question.

LIFESTYLE & HEALTH	Yes	No	Would you like to allow your tax preparer to discuss your return with the IRS? Tax Preparer's name _____
	Yes	No	Are either you or your spouse legally blind?
	Yes	No	Did you pay or receive alimony during the year? Paid / Received \$ _____ Recipient's SSN _____ Provide copy of Divorce Decree
	Yes	No	Are you currently a member of the military or Retired military? State of residency _____
	Yes	No	Did you purchase health insurance through the Government Marketplace? Form 1095-A (REQUIRED)
	Yes	No	Did you contribute to a Health Savings Account (HSA) during the year? If yes, provide Form 1099-SA and contribution amounts.
	Yes	No	Did you, or do you plan to contribute additional money to your HSA before 15 April 2021 for 2020 ?
	Circle One		Is the HSA account a Family plan or Individual Plan (Circle one) How many months did you participate in the HSA during the year? _____
	Yes	No	Do you have federal debt which is overdue, being collected, and is the responsibility of only one spouse? (for example, back child support, delinquent student loan debt...etc)
	Yes	No	Did you pay anyone for domestic services in your home? (If yes, complete the Household Domestic Worksheet).
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt cancelled? (includes credit cards and student loans)
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement? Divorce?
	Yes	No	Did you receive any economic impact payments? (Stimulus Checks) First Payment: (Maximum allowed \$1200 for individuals; \$2400 for married couples; plus \$500 for each qualifying child) Amount received for First payment \$ _____ Single or Married / how many qualifying children _____ Second Payment: (Maximum allowed \$600 for individuals; \$1,200 for married couples, plus \$600 for each qualifying child) Amount received for Second payment \$ _____ Single or Married / how many qualifying children _____
	FOREIGN	Yes	No
Yes		No	Did you have any accounts or assets outside the USA during the year? (Includes online, physical, virtual accounts, Pension, Trust, and Annuities, Real Estate, provide details)
Yes		No	Did you receive a distribution from, or were you the grantor of, or transfer to, a foreign trust?
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted during the year? If yes, provide birth certificates, social security cards and adoption records.
	Yes	No	Did you pay any college tuition for a child, a dependent, or yourself during the year? If yes, complete the Education Worksheet .
	Yes	No	Did you pay any student loan interest during the year? If yes, provide Form 1098-E.
	Yes	No	Did you pay for child or dependent care so you could work or go to school? If yes, provide W-10 or equivalent statement from daycare facility.
	Yes	No	Do you have any children who earned more than \$1,100 of investment income for the year?
	Yes	No	Did you make any contributions to a 529 plan during the year? If yes, please provide details.
	Yes	No	Did you take any distributions from a 529 plan during the year? Please provide Form 1099-Q.
	Yes	No	Have you paid alternative minimum tax (AMT) in previous years? If yes, please explain type and year(s).

Questions - All Taxpayers (Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse - enter "?" If unsure about a question.

INVESTMENTS	Yes	No	Did you roll over any amounts from a retirement account during the year? If yes, please provide details.
	Yes	No	Did you sell or transfer any stock or investment property? If yes, please provide details or statements.
	Yes	No	Did you, or will you, contribute any money to a Retirement account for the year? (circle types provide IRA amounts) 401K / 403B Traditional IRA: Taxpayer ____ / Spouse ____ Roth IRA Taxpayer ____ / Spouse ____
	Yes	No	Did you receive any income from an installment sale?
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft? Provide details
	Yes	No	Were you granted, or did you exercise, any employee stock options during the year?
	Yes	No	Did you engage in any Bit-Coin or other virtual currency transactions? If so, please provide details and statements. (includes any type of transactions, buy, sell, gifts, ..etc)
HOME	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.
	Yes	No	Did you pay sales taxes on a major purchase , such as a vehicle, boat, motorcycle, or home? provide receipts
	Yes	No	Did you make any charitable contributions? Please provide all statements.
	Yes	No	Did you have any uninsured loss to your property in a Federally Declared Disaster Area?
	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement and Form 1099-S.
	Yes	No	Did you refinance a mortgage or take a home equity loan? (Provide closing statement & details of what loan proceeds were used for)
OTHER DEDUCTIONS	Yes	No	Is either spouse a teacher, instructor, counselor, principal or aid for a K-12 school and work at least 900 hours during the year? If yes, please provide total expenses for books/supplies not reimbursed by employer
	Enter amt		Taxpayer _____ Spouse _____
	Yes	No	Did you claim the First-Time Homebuyer Credit when you purchased your home? (\$7500 loan; homes purchased in 2008)
	Yes	No	Did you purchase a new energy-efficient car, truck, or van? Electric or Hybrid please provide purchase documents
	Yes	No	Did you make any new energy-efficient improvements to your home such as solar, HVAC, Water heater? Provide Details
BUSINESS	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities or other venture?
	Yes	No	If yes, did you complete the appropriate business worksheet, Corporation, Farm, or Sole Proprietorship?
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g Airbnb, Uber, Door Dash etc.)
	Yes	No	Do you own rental property? If yes, please complete the rental worksheet.
	Yes	No	Did you make estimated tax payments during the year? If yes, provide details on the next page.

Additional Notes / Comments we should be aware of:

Dependency Worksheet

(complete if claiming children, parents or other individuals as a dependent, use additional sheets as necessary)

Taxpayer Name: _____ Spouse Name: _____

List complete names of each dependent (child, parent, or other dependent) claimed on your return. Use additional sheets as necessary.

Is each dependent a U.S. Citizen, U.S. National, or U.S. Resident Alien? Yes No Yes No

Relation of each dependent (if adopted, please provide dates) _____

How many months (or days) did each dependent reside in your home? _____

(see note1)

Total income received by dependent (including Social Security, investment, and other income) _____

Did you provide more than half the support for the dependent for the entire year? Yes No

Are you, or spouse, self-employed or receive any income from services or jobs you perform. (includes ride share, delivery, or other income producing activities) Yes No

1. Were all children claimed on this year's return natural born to both parents listed on this return, and no divorced or separated parents situation, or other claims to dependency applies? Yes No or NA

2. Can you provide documents to support your answer if requested by the IRS? (school or medical records showing residence of dependent) Yes No

3. Have you ever been denied earned income credit or child tax credit in the past? Explain. Yes No

4. Are you filing as Single or Head or Household? (Married filing jointly circle "no") Yes No

If dependent is your parent, or children and you answered "YES" to 1 and 2, and "NO" to 3 and 4 above, STOP HERE and sign the bottom.

Is the dependent a qualifying child of another taxpayer? **(see note2)** Yes No Yes No

If yes, please list who _____

Which parent has the highest adjusted gross income? _____

If child did not live in your home for the entire year, do you have a Form 8332 signed by the custodial parent? Yes No Yes No

If child resides in your home, did you release the custody to another parent for the year to allow them to claim the child? Yes No Yes No

Please provide a copy of school, daycare records, or other equivalent document with child's name and same address. (type of record) _____
(type of record provided) (type of record provided)

Note 1: Child must live with taxpayer for more than half the year. If child lives with both parents who are separated, then the custodial parent is determined by the number of days (nights) at each parents house. If child lives with parents equally, the IRS will treat the child as the qualifying child of the parent who had the higher adjusted gross income for the year

Note 2: Qualifying child of more than one person: Even if a child meets the conditions to be the qualifying child of more than one person, only one person can claim the child as a qualifying child for all of the following tax benefits, unless the special rule for Children of divorced or separated parents applies:

- | | |
|------------------------------------|---|
| 1. Dependency exemption | 4. Credit for child and dependent care expenses |
| 2. Child tax credits | 5. Exclusion for dependent care benefits |
| 3. Head of household filing status | 6. Earned income credit |

 Taxpayer's Signature Date Spouse's Signature Date

Estimated Tax Payments—Tax Year 2020

<i>Installment</i>	<i>Date paid</i> MM/DD/YY	<i>Federal (amount)</i>	<i>Date paid</i> MM/DD/YY	<i>State (amount)</i>
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2019 overpayment?		\$		\$
Total		\$		\$

Tax Preparation Checklist

Please provide the following documentation:

All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.

Form 1095-A (for health insurance purchased through a public exchange)

If you are a new client, provide copies of last year's tax returns.

The completed Individual Income Tax Organizer and Engagement letter for current year.

Copy of the closing statement if you bought or sold real estate.

Copy of all acknowledgement letters received from charitable organizations for contributions made during the tax year.

Completed dependency worksheet if you are claiming any dependents on your return, including children, parents, or other dependents

Please note: For charitable deductions, we are required to have a copy of acknowledgement letters for charity donations of \$250 or more, as well as, additional reporting requirements for non-cash donations (Goodwill, Salvation Army). For more information on the charity requirements you can view our website downloads page and click on the charity form.

Any applicable worksheets for personal deductions or business deductions (rental worksheet/sole proprietor worksheets)