

2021
TAX ORGANIZER

PLEASE USE THIS FORM TO ASSIST WITH GATHERING OF INFORMATION FOR YOUR 2021 TAX RETURN

Taxpayer: _____

Taxpayer date of birth: _____

Taxpayer occupation: _____

Email _____

Spouse: _____

Spouse date of birth: _____

Spouse occupation: _____

Email _____

Address: _____

City, Village or Town: _____

County: _____

Telephone #: _____

Dependents	SS#	Date of Birth
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Direct deposit of refund: ___ Yes ___ No

Bank Name: _____

Bank Routing Number: _____

Account Number: _____

Savings ___ Checking ___

Do you rent: ___ Yes ___ No

Rent paid: _____

___ With heat ___ Without heat

Stimulus Check received _____

Tuition Expense:

Name	Amount	Yr	School
_____	_____	___	_____
_____	_____	___	_____
_____	_____	___	_____

Pension Contributions (other than at work):

IRA – taxpayer _____

IRA – spouse _____

Roth IRA – taxpayer _____

Roth IRA – spouse _____

Educator expenses: _____

Itemized Deductions:

Medical:

Doctors _____ Hospitals _____

Medications _____ Glasses _____

Hearing aids _____ Mileage _____

Other _____

Taxes paid:

Real Estate:

Home _____ Cottage _____

Personal property taxes _____

Interest paid:

Mortgage:

Lender	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Donations: (must have receipt or cancelled check or both)

Non cash contributions:

Gambling winnings _____

Unemployment _____

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W2's

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Other income not listed above

_____	_____
_____	_____
_____	_____

Interest income

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Other deductions not listed elsewhere

_____	_____
_____	_____
_____	_____
_____	_____

Dividend income

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Do you have an HSA through your Employer? _____

HSA Contribution you paid other than by deduction from your paycheck

Pension plan withdrawals

_____	_____
_____	_____
_____	_____

Social Security Received

Taxpayer _____ Spouse _____

K-1's

_____	_____
_____	_____
_____	_____
_____	_____

Rental income

_____	_____
_____	_____