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HILL, BARTH & KING LLC
1000 SE MONTEREY COMMONS BLVD. STE 101
STUART, FL 34996-3327

only

2020 TAX ORGANIZER

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JOHN C. & NINA K. NORRIS
379 SW ASHBY LANE
PALM CITY, FL 34990-1761

✓✓ Stimulus payments

\$1,200 * MARCH/
APRIL
ONE

none for 2nd

Rachel

Formulation WD'S

\$4,000 - RCMA

ELSE - St. Mary's

- HRK

This tax organizer has been prepared for your use in gathering the information needed for your 2020 tax return.

To save you time, selected information from your 2019 tax return has been entered in this organizer. Please line through any information that does not apply to your 2020 tax return.

In some cases, 2019 amounts have been included in a separate column. These amounts are for comparison purposes only. You do not need to change these prior year amounts.

If we may be of further assistance, please contact us at your convenience.

(772) 287-4480

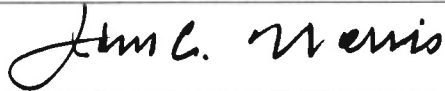

REMOVE THIS SHEET PRIOR TO RETURNING THE COMPLETED ORGANIZER

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MJOHN C. & NINA K. NORRIS
379 SW ASHBY LANE
PALM CITY, FL 34990-1761

2020 TAX ORGANIZER

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OHILL, BARTH & KING LLC
1000 SE MONTEREY COMMONS BLVD. STE 101
STUART, FL 34996-3327

I (We) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct and complete to the best of my (our) knowledge.

Taxpayer Signature		Date	2/26/21
Spouse Signature		Date	2/26/21

Questions (Page 1 of 5)

The following questions pertain to the 2020 tax year. For any question answered Yes, include supporting detail or documents.

Personal Information:

	Yes	No
Did your marital status change?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Are you married?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
If Yes, do you and your spouse want to file separate returns?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If No, are you in a domestic partnership, civil union, or other state-defined relationship?	<input type="checkbox"/>	<input type="checkbox"/>
Can you or your spouse be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you or your spouse serve in the military or were you or your spouse on active duty?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Dependents:

Were there any changes in dependents from the prior year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Note: Include non-child dependents for whom you provided more than half the support.		
Did you or your spouse pay for child care while you or your spouse worked or looked for work?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Do you have any children under age 18 with unearned income more than \$1,100?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than \$1,100?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you adopt a child or begin adoption proceedings?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Are any of your dependents non-U.S. citizens or non-U.S. residents?	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Healthcare:

Did you obtain healthcare coverage through the Marketplace?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
If Yes, include all Forms 1095-A.		
If you received advance premium tax credit, are married, and are filing separately from your spouse, are you a victim of domestic abuse or spousal abandonment?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you, your spouse, or a dependent have healthcare purchased through the Marketplace and for whom you did not receive Form 1095-A?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you receive Form 1095-A for someone claimed as a dependent on another taxpayer's return or who is filing their own return and is not claimed on another taxpayer's return?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Are any of your dependents required to file a tax return?	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Questions (Page 2 of 5)

Healthcare (continued):

Yes No

Was anyone covered on your health insurance policy also covered on another health insurance policy for any part of the year?

_____ ✓

Were you eligible for employer-sponsored healthcare coverage?

✓ _____

Did you or your spouse have any transactions pertaining to a health savings account (HSA)?

If you received a distribution from an HSA, include all Forms 1099-SA.

_____ ✓

Did you or your spouse have any transactions pertaining to a medical savings account (MSA)?

If you received a distribution from an MSA, include all Forms 1099-SA.

_____ ✓

Did you or your spouse receive any distributions from long-term care insurance contracts?

If Yes, include Forms 1099-LTC.

_____ ✓

If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job?

_____ _____

If Yes, how many months were you covered? _____

If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's long-term care plan at another job?

_____ _____

If Yes, how many months were you covered? _____

Did you or your spouse lose your job because of foreign competition and pay for your own health insurance?

_____ _____

Education:

Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition?

_____ ✓

Did you or your spouse pay any student loan interest?

_____ ✓

Did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren?

_____ ✓

Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529) plan?

_____ ✓

If Yes, include all Forms 1099-Q.

If Yes, were the amounts withdrawn used for qualified tuition expenses?

_____ _____

Deductions and Credits:

Did you or your spouse contribute property (other than cash) with a fair market value of more than \$5,000 to a charitable organization?

_____ ✓

If Yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of \$10,000 or less.

Did you or your spouse incur any casualty or theft losses?

_____ ✓

Did you or your spouse make any large purchases, such as motor vehicles and boats?

_____ ✓

Did you or your spouse incur any casualty or loss attributable to a federally declared disaster?

_____ ✓

Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle?

_____ ✓

Did you or your spouse use gasoline or special fuels for business or farm purposes (other than for a highway vehicle)?

_____ ✓

If Yes, provide the number of gallons or special fuels used for off-highway business purposes.

_____ Gallons _____ Type

Did you or your spouse install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?

_____ ✓

Did you or your spouse install any energy efficiency improvements or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners, or water heaters?

_____ ✓

Questions (Page 3 of 5)

Investments:

Yes No

Did you or your spouse have any debts canceled, forgiven or refinanced?

_____ ✓

Did you or your spouse start or purchase a business, rental property, or farm, or acquire any new interest in any partnership or S corporation?

_____ ✓

Did you or your spouse sell an existing business, rental property, farm, or any existing interest in a partnership or S corporation?

_____ ✓

Did you or your spouse sell, exchange, or purchase any real estate?

_____ ✓

If Yes, include closing statements.

Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you or your spouse or dispose of any stock acquired under a qualified employee stock purchase plan?

_____ ✓

Did you or your spouse engage in any put or call transactions?

_____ ✓

If Yes, provide the transaction details.

Did you or your spouse close any open short sales?

_____ ✓

Did you or your spouse sell any securities not reported on Form 1099-B?

_____ ✓

Retirement or Severance:

Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?

_____ ✓

Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan?

_____ ✓

Did you or your spouse make a qualified charitable contribution?

✓ _____

Did you or your spouse retire or change jobs?

_____ ✓

Did you or your spouse receive deferred, retirement or severance compensation?

_____ ✓

If Yes, enter the date received (Mo/Da/Yr). _____

Personal Residence:

Did your address change?

_____ ✓

If Yes, provide the new address.

If Yes, did you move to a different home because of a change in the location of your job?

_____ ✓

Did you or your spouse claim a homebuyer credit for a home purchased in 2008?

_____ ✓

Did you or your spouse withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?

_____ ✓

Are your total mortgages on your first and/or second residence greater than \$750,000?

_____ ✓

If Yes, provide the principal balance and interest rate at the beginning and end of the year. _____

Did you or your spouse take out a home equity loan?

_____ ✓

Did you or your spouse have an outstanding home equity loan at the end of the year?

_____ ✓

If Yes, provide the principal balance and interest rate at the beginning and end of the year. _____

Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?

_____ ✓

Did you or your mortgagee receive mortgage assistance payments?

_____ ✓

If Yes, include all Forms 1098-MA.

Questions (Page 4 of 5)

Sale of Your Home:

Yes No

Did you sell your home?

_____ ✓

Did you receive Form 1099-S?

_____ _____

If Yes, include Form 1099-S.

Did you or your spouse own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale?

_____ _____

Did you or your spouse ever rent out the property?

_____ _____

Did you or your spouse ever use any portion of the home for business purposes?

_____ _____

Have you or your spouse sold a principal residence within the last two years?

_____ _____

At the time of the sale, the residence was owned by the: _____ Taxpayer _____ Spouse _____ Both

Gifts:

Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value in excess of \$15,000 to any individual?

_____ ✓

Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?

_____ ✓

Did you or your spouse make any gifts to a trust for any amount?

_____ ✓

Did you or your spouse have a life insurance trust?

_____ ✓

Did you or your spouse assist with the purchase of any asset (auto, home) for any individual?

_____ ✓

Did you or your spouse forgive any indebtedness to any individual, trust or entity?

_____ ✓

Foreign Matters:

Did you or your spouse perform any work outside of the U.S. or pay any foreign taxes?

_____ ✓

Were you or your spouse grantor or transferor for a foreign trust, have any interest in or a signature authority over a bank account, securities account or other financial account in a foreign country?

_____ ✓

Did you or your spouse create or transfer money or property to a foreign trust?

_____ ✓

Did you or your spouse own any foreign financial assets?

_____ ✓

Were you or your spouse subject to the transition tax on undistributed foreign income and elect to pay the tax in installments?

_____ ✓

Did you or your spouse have an interest in an S corporation that had undistributed foreign income subject to the transition tax?

_____ ✓

If Yes, did the corporation cease to be an S corporation?

_____ _____

If Yes, was there a sale or liquidation of substantially all of the corporation's assets or did the corporation cease business?

_____ ✓

If Yes, did you or your spouse transfer any share of stock in the corporation?

_____ _____

Questions (Page 5 of 5)

Miscellaneous:

	Yes	No
Did you or your spouse pay in excess of \$1,000 in any quarter or \$2,200 during the year for domestic services performed in or around your home to individuals who could be considered household employees?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you or your spouse receive unreported tip income of \$20 or more in any month?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Have you or your spouse received a punitive damage award for damages other than for physical injuries or illness?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you or your spouse engage in any bartering transactions?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Were you or your spouse notified by the IRS or other taxing authority of any changes in prior year returns?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
For any trust that you or your spouse created or are trustee, did any beneficiaries, grantors, or trustees die or move?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you or your spouse sell, acquire, or exchange Bitcoin or other virtual currencies or engage in any sales or exchanges denominated in Bitcoin or other virtual currencies?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you or your spouse receive an economic impact payment?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If Yes, enter the amount of any economic impact payment received. _____		
If Yes, did you or your spouse repay any of the economic impact payment received?	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, enter the amount of the economic impact payment repaid. _____		

Additional state pages have been included at the back of the organizer and should be reviewed.



2020

Dependents and Wages

3A

Dependent Information:

	First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	Relationship to Taxpayer
A						
B						
C						
D						
E						
F						
G						
H						

Did dependent have income over \$4,300?



	Months Lived in Your Home	X if Disabled	Yes or No	Identity Protection PIN
A				
B				
C				
D				
E				
F				
G				
H				

Provide the name of any dependent who is not a U.S. citizen or Green Card holder.

Provide the name of any person living with you who is claimed as a dependent on someone else's tax return.

List the years that a release of claim to exemption is given for a dependent child not living with you.

Wages and Salaries:

Include all copies of your current year Forms W-2

Note: Use this section to report any wages and/or salaries for which no Form W-2 was received.

TS	Employer's Name	Taxable Wages	Tax Withheld				
			Federal	FICA/TIER 1	Medicare	State	Local



2020

Electronic Filing

4

Electronic Filing:

Electronic filing is the means by which your return is transmitted directly to the IRS and state tax authorities. The IRS has implemented an electronic filing mandate requiring certain preparers, including this firm, to file all returns that they prepare electronically. Some states also require certain preparers to electronically file state returns prepared. The IRS and some states allow taxpayers to elect not to file their returns electronically.

Do not electronically file the federal return

☐

Do not electronically file the state return(s)

☐

Note: The IRS and some states that require returns to be electronically filed also impose fees and/or penalties for failure to do so. If you checked either of the boxes above, you may be required to sign an "opt-out" form before we can release your returns. As a follow-up we will contact you to discuss these requirements and your ability to "opt-out" of electronic filing.

The IRS requires, and many states allow, the use of a Personal Identification Number (PIN) in lieu of mailing a signature document when electronically filing.

Would you like to use a randomly generated PIN?

Yes	No
-----	----

Taxpayer

☐
☐

Spouse

☐
☐

If No, enter a 5-digit self-selected PIN:

Taxpayer PIN

Spouse PIN

OK



2020

Direct Deposit and Withdrawal

4A

Direct Deposit and Electronic Funds Withdrawal Account Information:

The IRS and certain states allow refunds to be deposited to and balances due to be paid directly from your financial institution. If you would like to receive your refund or pay a balance due electronically, complete the following information. If you selected either of these options in 2019, your account information may already be included below.

Would you like any refunds owed to you directly deposited?	Yes	No
Would you like to pay any amount due on your <u>federal</u> return using electronic withdrawal?	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, what amount would you like withdrawn, if not the entire balance due?		
If Yes, when should the withdrawal occur, if other than the due date of the return?	(Mo/Da/Yr)	
Would you like to pay any amount due on your <u>state</u> return(s) using electronic withdrawal?	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, what amount would you like withdrawn, if not the entire balance due?		
If Yes, when should the withdrawal occur, if other than the due date of the return?	(Mo/Da/Yr)	
The IRS and some states allow estimated payments to be electronically withdrawn on the due dates of the estimated payments.		
Would you like to pay any estimated payments due for your <u>federal</u> return using electronic withdrawal?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to pay any estimated payments due for your <u>state</u> return(s) using electronically withdrawal, if available?	<input type="checkbox"/>	<input type="checkbox"/>

Name of bank or financial institution SEACOAST NATIONAL BANK

Routing Transit Number (RTN) 067005158

Account number XXXXXX2966

Type of account: ☒ Checking ☒ Traditional Savings ☐ IRA Savings
 ☐ Archer MSA Savings ☐ Coverdell Ed. Savings ☐ HSA Savings

Is this a business account? ☐ Yes ☒ No

Account owner ☒ Taxpayer ☒ Spouse ☒ Joint

I confirm that the bank account information and the direct deposit/electronic withdrawal options selected above are correct. ☐

Would you like any refunds owed to you directly deposited?	Yes	No
Would you like to pay any amount due on your <u>federal</u> return using electronic withdrawal?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
If Yes, what amount would you like withdrawn, if not the entire balance due?		
If Yes, when should the withdrawal occur, if other than the due date of the return?	(Mo/Da/Yr)	
Would you like to pay any amount due on your <u>state</u> return(s) using electronic withdrawal?	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, what amount would you like withdrawn, if not the entire balance due?		
If Yes, when should the withdrawal occur, if other than the due date of the return?	(Mo/Da/Yr)	
The IRS and some states allow estimated payments to be electronically withdrawn on the due dates of the estimated payments.		
Would you like to pay any estimated payments due for your <u>federal</u> return using electronic withdrawal?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to pay any estimated payments due for your <u>state</u> return(s) using electronically withdrawal, if available?	<input type="checkbox"/>	<input type="checkbox"/>

Name of bank or financial institution _____

Routing Transit Number (RTN) _____

Account number _____

Type of account: ☐ Checking ☐ Traditional Savings ☐ IRA Savings
 ☐ Archer MSA Savings ☐ Coverdell Ed. Savings ☐ HSA Savings

Is this a business account? ☐ Yes ☐ No

Account owner ☐ Taxpayer ☐ Spouse ☐ Joint

I confirm that the bank account information and the direct deposit/electronic withdrawal options selected above are correct. ☐