

2020
TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name		Last name	
First name		First name	
Middle Initial.....	Suffix	Middle Initial.....	Suffix
Social security number		Social security number	
Occupation		Occupation.....	
Work phone	Ext ...	Work phone	Ext ...
Cell phone		Cell phone	
E-mail address.....		E-mail address	
Date of birth		Date of birth	
Address		Apartment number	
City	State.....	ZIP Code	
Home phone.....	Fax number		

Dependent Information

First name	MI	Social Security Number	Date	Months Lived	Child Care
Last name	Suffix	Relationship	of Birth	with Taxpayer	Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2020 qualified student loan interest.....

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation

Employer Name	2019 Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	2019 Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits

Taxpayer

Spouse

Social Security Benefits from Form SSA-1099	_____	_____
Railroad Retirement Benefits from Form RRB-1099	_____	_____
Medicare B premiums withheld.....	_____	_____
Medicare C premiums withheld.....	_____	_____
Medicare D premiums withheld.....	_____	_____

Attach Form(s) 1099-MISC – Miscellaneous Income and 1099-NEC

1099-MISC Payer Name and 1099-NEC Payer Name

Attach Form(s) 1099-INT – Interest Income

1099-INT Payer Name	2019 Amount
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV – Dividend Income

1099-DIV Payer Name	2019 Amount
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

	Taxpayer	Spouse
Retirement Plan Contributions		
Traditional IRA contributions made for 2020	_____	_____
Roth IRA contributions made for 2020	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____

2020 Deductions

Medical and Dental Expenses	2020 Amount	2019 Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses: _____		

Taxes	2020 Amount	2019 Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		

Interest Expenses		
Home mortgage interest paid — Attach Form(s) 1098.		
Lender's Name _____	2020 Amount	2019 Amount
Points paid on loan to buy, build or improve main home		
Lender's Name _____	2020 Amount	

Cash/Check/Credit Contributions	2020 Amount	2019 Amount

Noncash Charitable Contributions		
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.		

Miscellaneous Deductions	2020 Amount	2019 Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list): _____		

	Yes	No
1 Did you receive an Economic Impact (Stimulus) Payment? If yes, how much did you receive?	<input type="checkbox"/>	<input type="checkbox"/>
2 Did a lender cancel any of your debt in 2020? (Attach any Forms 1099-A or 1099-C)	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2020? If yes , please attach details	<input type="checkbox"/>	<input type="checkbox"/>
4 Did you purchase a motor vehicle or boat during 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , attach documentation showing sales tax paid.		
5 Did you purchase a hybrid or electric vehicle in 2020? If yes , enter year, make, model, and date purchased:	<input type="checkbox"/>	<input type="checkbox"/>
6 Did you donate a vehicle in 2020? If yes , attach Form 1098C	<input type="checkbox"/>	<input type="checkbox"/>
7 What was the sales tax rate in your locality in 2020 ? % State ID		
8 Did your marital status change during 2020?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , explain:		
9 Were you or your spouse permanently and totally disabled in 2020?	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you have dependents who must file?	<input type="checkbox"/>	<input type="checkbox"/>
11 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,200? ...	<input type="checkbox"/>	<input type="checkbox"/>
12 Did you provide over half the support for any other person during 2020?	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you incur adoption expenses during 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
14 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you receive any disability payments in 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
16 Did you receive tip income not reported to your employer?	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2020 ? If yes , attach closing or escrow statements, 1099-C or 1099-A forms	<input type="checkbox"/>	<input type="checkbox"/>
b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?	<input type="checkbox"/>	<input type="checkbox"/>
18 Did you incur any casualty or theft losses during 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
19 Did you incur any non-business bad debts?	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you pay any individual for domestic services in 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
21 Did you take a retirement account distribution related to the corona virus or a natural disaster?	<input type="checkbox"/>	<input type="checkbox"/>
22 Did you buy or sell any stocks or bonds in 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
23 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? ..	<input type="checkbox"/>	<input type="checkbox"/>
24 Did you incur any moving expenses? If yes , attach details	<input type="checkbox"/>	<input type="checkbox"/>
25 Did you receive any income not included in this Tax Organizer?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please attach information.		
26 Do you expect your income and deductions in 2021 to be the same as 2020 ?	<input type="checkbox"/>	<input type="checkbox"/>
If no , attach explanation of changes expected.		
27 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach	<input type="checkbox"/>	<input type="checkbox"/>
28 At any time during 2020, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	<input type="checkbox"/>	<input type="checkbox"/>
29 a Did you obtain a Paycheck Protection Program (PPP) loan?	<input type="checkbox"/>	<input type="checkbox"/>
b If yes, has any portion of that loan been forgiven?	<input type="checkbox"/>	<input type="checkbox"/>
30 If you paid any alimony, enter recipient's SSN: Alimony paid:		
31 Enter your state of residence	<input type="checkbox"/>	<input type="checkbox"/>

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	<input type="checkbox"/>	<input type="checkbox"/>
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.		
If you receive a refund, would you like direct deposit?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please provide a voided check (not a deposit slip) if your bank account information has changed.		
What type of account is this?	<input type="checkbox"/>	<input type="checkbox"/>

Estimated Tax Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)

**ADDITIONAL 2020
TAX ORGANIZER INFORMATION**

Name(s)_____

Please print clearly

1. Did you or your spouse pay rent in 2020? If yes, what was total rent paid in 2020: \$_____.
2. Did you or your spouse pay for commuter rail tickets or EZ Pass tolls in 2020 for commuting to work in Massachusetts? Yes ____ No ____
If yes, how much did you pay: Commuter rail: \$_____ EZ Pass \$ _____
How much did your spouse pay: Commuter rail: \$ _____ EZ Pass \$ _____
3. Did you have health insurance coverage during 2020 while living in Massachusetts?
You: Yes ____ No ____ Your Spouse: Yes ____ No ____

If yes, did you/your spouse receive MA Form 1099HC or other proof of minimum credible coverage?
If yes, provide copy of Form 1099HC.

Are you covered by Medicare? Yes ____ No ____
Is your spouse covered by Medicare? Yes ____ No ____
4. Did you or your spouse receive a Stimulus Check in 2020? Yes ____ No ____
5. Did you or your spouse receive a Paycheck Protection Program Loan (a PPP Loan)? Yes ____ No ____

If yes, did you or your spouse apply for forgiveness in 2019? Yes ____ No ____
6. Did you or your spouse receive an Economic Injury Disaster Advance (an EIDL Advance)?
Yes ____ No ____

If yes, how much was the EIDL Advance? \$ _____
7. In 2020, did you or your spouse receive unemployment compensation? Yes ____ No ____

If yes, how much did you receive: \$ _____; provide a copy of Form 1099-G
How much did your spouse receive: \$ _____; provide a copy of Form 1099-G
8. At any time during 2020 did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency? Yes ____ No ____