

Tax Year 2020/Filing Year 2021

name:	
SSN:	
Address:	
Contact #:	
Personal Information:	Y/N
1. Did any births, adoptions, marriages, divorces, or deaths occur in your family in the last year?	
2. Did you purchase or sell your principal residence or did your address change?	
3. Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return?	
4. Were you in a registered domestic partnership, civil union, or same-sex marriage during 2020?	
5. Were either you or your spouse in the military or National Guard?	
6. Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax	
correspondence?	
Dependents:	
1. Are there any changes in your dependents from last year? Births, adoptions, etc.	
2. Did you have any children under 19 (or 24 if a full time student) who received more than \$1,050 in investment income?	
3. Did you pay education expenses for your dependent children?	
4. Did you pay any dependent care expenses for a child or a parent?	
5. Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent?	
6. Are all of your dependents either US residents or citizens?	
Health Care Coverage:	
1. Did you or a member of your family have health coverage in 2020? (The entity that provided the coverage may have sent you a Form 1095-A, 1095-B, or 1095-C, that lists individuals in your family who were enrolled in mimimum essential coverage and shows their months of coverage.)	
2. Did you have Health Insurance Marketplace granted coverage exemption or are you claiming a coverage exemption?	
Income (in 2020, did you or your spouse have any of the following?):	
1. Wages? (include form(s) W-2)	
2. Non-employee compensation? (include form(s) 1099-MISC or 1099-NEC)	
3. Interest income? (include form(s) 1099-INT)	
4. Dividend income? (include form(s) 1099-DIV) Investment Income? (1099-B or consolidated stmt)	

5. Did you receive any tax exempt income, such as interest or dividends from municipal bonds or a mutual fund account?	
6. Gambling income? (include form(s) W-2G). Be sure to include any gambling expenses.	
7. Social security or Railroad Retirement benefits? (include form(s) SSA-1099 & RRB-1099)	
8. Did you receive any state or local refund, or a refund of any other deduction you itemized in prior year? (attach 1009-G)	
9. Disability income? (include form(s) W-2 or 1099)	
10. Unemployement compensation? (include form(s) 1099-G)	
11. Alimony received for a divorce agreement executed prior to December 31, 2018?	
12. Did you receive tip income NOT reported to your employer?	
13. Did you receive payments from a Long-Term Care insurance contract?	
14. Did you barter your services for goods and services from someone else?	
15. Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp?	
16. Did you receive employer-provided adoption benefits for a previous year?	
17. Did you cash any U.S. savings bonds?	
18. Did you make a loan to someone at an interest rate below market rate?	
19. Did you receive a housing allowance for ministerial services you provided?	
20. Did you receive any income not specified in this organizer?	
21. Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)?	
Foreign Reporting:	
1. Did you have an interst in or signature authority over a financial account in a foreign country?	
2. Were you the grantor of or transferor trust?	
3. Did you receive income from a foreign source or pay taxes to a foreign government?	
Retirement & Other Plans:	
1. Did you receive any distributions from a retirement plan? (include form(s) 1099-R)	
2. Did you rollover a retirement plan distribution into another plan?	
3. Did you convert a traditional IRA to a Roth IRA?	
4. Did you make a contribution to a retirement plan? (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)	
5. Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account?	
6. Did you receive a distribution from an HSA, Archer MSA, or Medicare Advantage MSA? (include form(s) 1099-SA)	

7. Did you make any contributions to HSA (Heath Savings Account) in 2020? (Form 5498)	
Purchases, Sales, Gains, and Losses:	
1. Did you exchange any securities or investments for something other than cash?	
2. Do you have any short sales, commodity sales, or straddles?	
3. Did you receive Form 2439?	
4. Did you buy or sell any bonds?	
5. Did you receive stock from a stock bonus plan with your employer?	
6. Did you sell any other personal assets at a gain?	
7. Did you sell any real estate during the year?	
If yes please specify:	
Personal	
Business	
Real Estate Professional	
Other	
8. Did you sell any assets using the installment method?	
9. Did you receive proceeds from a prior year installment property?	
10. Did you purchase a rental property?	
11. Did you exchange any property for another property?	
12. Did you incur loss because of damaged or stolen property?	
13. Did you purchase a new vehicle, aircraft, or boat?	
14. Did any security become worthless during 2020?	
15. Did any debts become uncollectible during 2020?	
16. Did you purchase any items acquired out of state, online or by mail order that did not include sales tax?	
Business and Rental Property Income & Deductions:	
1. Do you own rental property and qualify as a Real Estate Professional?	
2. Did you start or aquire a new business?	
3. Did you sell any part of an existing business, or sell business assets?	
4. Did you cease operating any business or rental property?	
5. Did you remove any of your business assets for personal use?	

6. Did you use part of your home for business purposes?	
7. Did you make any contributions to a Keogh or a self-employed SEP plan for 2020?	
8. Do you pay for any health or long-term care insurance through your business?	
9. If you or your spouse are self-employed, are either of you covered under an employer's health plan?	
10. Did you purchase any furniture or equipment for your business?	
Other Decuctions:	
1. Did you use your car on the job? (Other than to and from work)	
2. Did you work out of town for part of the year?	
3. Did you incur any travel expenses for business purposes?	
4. Did you pay expenses for the care of your child or other dependent so you could work?	
5. Did you purchase a 'clean fuel' or electric hybrid vehicle in 2020?	
6. Did you make energy efficient improvements to your home or purchase any energy-saving property during 2020?	
7. Did you contribute less than an entire interest in any property to charity?	
8. Did you refinance a mortgage or take out a home equity loan during 2020?	
9. Did you have a mortgage or related debt fogiven in 2020?	
10. Did you or your spouse pay any education expenses for yourselves?	
11. Did you pay any student loan interest?	
12. Did you make any federal or state estimated payments?	
13. Did you have a certain trade or business from which you figured your domestic production activities deduction?	
14. Did you pay alimony for a divorce agreement executed prior to December 31, 2018?	
15. Did you donate non-cash items?	
16. Did you donate a vehicle?	
Miscellaneous:	
1. Did you make gifts of more than \$14,500 to any one person?	
2. Did you engage the service of any household employees?	
3. Did your bank account information change within the last twelve months?	
4. Do you want to allocate \$3 to the Presidential Election Campaign Fund?	
5. Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?	
6. Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2020?	

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7. Did you claim a First-time Homebuyer credit for a home purchased in 2008?	ı
8. Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit?	1
9. For the MT 2EC, are you age 65 or older & a full time Montana resident?	
Return Preparation & Filing	
1. Do you want to e-file your return?	
2. If you are due a refund, how do you want to receive it?	
Check sent to you in the mail	
Apply to next year's estimates	
Direct deposit *	
Type of Account	
Checking	
Savings	
If you owe taxes, how do you want to pay them?	
Paper check sent with my return	
Direct debit *	
Type of Account	
Checking	
Savings	
Credit Card	
Installment Agreement	
* Please have bank account info ready for appointment	
3. Do you want to allow your tax preparer to discuss this years return with the IRS?	
If no, enter another person (if desired) to be allowed to discuss this return with the IRS:	
Designee's Name:	
Phone Number:	
Personal Identification Number (5-digit PIN):	
Other Notes & things we should know:	

