ORGANIZER Page 1 2021 1040 US Tax Organizer Tax Return Appointment **Bauer & Scott, CPAs, LLP 16027 Comprint Circle** Date: Gaithersburg MD 20877 Time: Telephone number: 301-948-8940 Location: Fax number: 301-258-9244 E-mail address: This tax organizer will assist you in gathering information necessary for the preparation of your 2021 tax return. Please enter all pertinent 2021 information. NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement. NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement. CLIENT INFORMATION Taxpayer First name and initial.... Last name..... Title/suffix..... Social security number... Occupation..... Date of birth (m/d/y).... Date of death (m/d/y).... 1=blind..... Home phone..... Work phone..... Work extension.... Cell phone..... E-mail address... In care of..... Street address.... Apartment number. Address City. State..... ZIP code..... **DEPENDENTS** Dependent No. Dependent No. First name....... Last name..... Title/suffix..... Date of birth (m/d/y).... Date of death (m/d/y) Date of adoption (m/d/y) Social security number... Relationship..... Months lived at home... Dependent No. Dependent No. First name..... Last name..... Title/suffix..... Date of birth (m/d/y).... Date of death (m/d/y) Date of adoption (m/d/y) .

Social security number... Relationship..... Months lived at home....

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ORGANIZER 2021 1040 US Tax Organizer MISCELLANEOUS INCOME Taxpayer: Alimony received Spouse: Alimony received Other: RETIREMENT PLAN CONTRIBUTIONS 2021 Amount 2020 Amount Taxpayer: Traditional IRA contributions (1=maximum)..... Roth IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) Spouse: Roth IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) OTHER GOVERNMENT FORMS - DEDUCTIONS Attach Forms 1098 AFFORDABLE CARE ACT Form 1095-A - Health Insurance Marketplace Statement Attach Forms 1095 Form 1095- B - Health Coverage Form 1095-C - Employer-Provided Health Insurance Offer and Coverage ADJUSTMENTS TO INCOME Taxpayer: Educator expenses..... Other adjustments to income: Spouse: Educator expenses... Other adjustments to income: MEDICAL AND DENTAL EXPENSES Prescription medicines and drugs Doctors, dentists and nurses..... Insurance premiums..... Insurance reimbursement..... Number of medical miles..... Other: TAXES PAID State income taxes - 1/21 payment on 2020 state estimate

ORGANIZER 2021 1040 US Tax Organizer TAXES PAID (continued) 2021 Amount 2020 Amount State income taxes - paid with 2020 state extension State income taxes - paid with 2020 state return State income taxes - paid for prior years and/or to other states City/local income taxes - 1/21 payment on 2020 city/local estimate City/local income taxes - paid with 2020 city/local extension City/local income taxes - paid with 2020 city/local return State and local sales taxes (except autos and special items) Use taxes paid on 2021 purchases Use taxes paid on 2020 state return Sales tax on autos not included above... Sales taxes paid on boats, aircraft, and other special items Foreign income taxes..... Attach Tax Notice Personal property taxes (including automobile fees in some states) INTEREST PAID Home mortgage interest and points paid: Attach Forms 1098 Home mortgage interest not on Form 1098 (include name, SSN, & address of payee): Points not reported on Form 1098: Investment interest (interest on margin accounts): Passive interest..... CASH CONTRIBUTIONS NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s). Volunteer expenses (out-of-pocket)..... Number of charitable miles..... NONCASH CONTRIBUTIONS NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied. MISCELLANEOUS DEDUCTIONS Union and professional dues..... Tax return preparation fee..... Safe deposit box rental..... Investment expenses. Estate tax, section 691(c)..... Unreimbursed employee expenses: Other: