

Tax Partners Northwest Tax Return Organizer

Client information

	Taxpayer	Spouse
First and last name		
Social security number (if not on file)		
Occupation		
Date of birth		
Driver's license number		
State/issue/exp date		
Primary phone		
Email		
Mailing Address		
Preferred method of contact		
IRS Identity Theft PIN?		

Dependents

	Dependent 1	Dependent 2
First and last name		
Social security number (if not on file)		
Date of birth		
Relationship		
Months lived in home		
US Citizen or resident?		
Amount paid for daycare (attach statement)		
Full time student?		
Amount paid for college		
Income earned		
Investment income		

Attach information for additional dependents

Please list the forms you are providing	If so, how many?
W-2s	
1099 Interest	
1099 Dividends	
1099R Retirement	
1099B Stock sales	
W-2G Gambling income	
Gambling loss statement	
1099 MISC income	
1099G Unemployment/Paid Family Medical Leave	

SSA 1099 Social security	
1099S Sale of real estate	
Did you buy or sell a house? Provide closing papers	
1099C Cancellation of debt	
Money withdrawn from college savings plan	
Forms for Health Savings Accounts	
K-1 forms	
Any other sources of income? Provide details.	

General information - Please answer all questions

Please circle one

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?	Yes	No
Did you or your spouse have a foreign bank account or trust, or signature authority over someone else's?	Yes	No
Did you receive a gift or inheritance from someone in another country?	Yes	No
Did you make any gifts larger than \$15,000 per individual or trust in 2021?	Yes	No
Did you pay any foreign taxes that aren't already included on a tax form?	Yes	No
Did you pay any household employee more than \$2300 in 2021?	Yes	No
Did you or your spouse have income from a hobby, prizes, barter, jury duty, or any other income?	Yes	No
Did you receive money from any type of settlement?	Yes	No
Did you receive a stimulus payment in 2021? Please attach letter 6475.	Yes	No
Did you receive Advance Child Tax Credit payments? Please attach letter 6419.	Yes	No

Payments

Did you make any payments to IRS toward your 2021 taxes? List dates and amounts

Notes for your preparer:

Check yes and provide info for the items that apply to you

Small business items

- Business income and expenses
- 1099 NEC income
- Did you or your spouse receive money from Small Business Association or Paycheck Protection Program funds? If so, have they been forgiven? When?
- Did you postpone payment of any payroll taxes in 2020 or 2021?
- Did you receive any grants?

Rental property

- Rental income and expenses
- Any new assets purchased?
- What dates was it available to be rented?

Retirement

- Did you make a contribution to a retirement plan outside of payroll deductions?
- Did you make a repayment of money you took out of retirement in 2020?
- Did you roll over any retirement account money into a Traditional IRA?
- Did you convert any Traditional IRA funds to Roth?

Health Care Coverage Forms

- 1095A if you purchased your insurance through the state marketplace
- 1095B and 1095C showing health insurance coverage
- 1099LTC Long term care insurance payments

Adjustments to income

- Are you or your spouse a teacher in grades K-12 and spent at least \$250 on classroom supplies in 2021?
- Are you or your spouse self-employed and paid for health insurance out of pocket?
- 1098E Student loan interest
- Did you pay or receive alimony from a divorce that was final before 2019?
- Did you contribute to a health savings account outside of a payroll deduction?

How much?

Deductions

Medical and Dental Expenses not reimbursed

- Prescription medicine and drugs
- Doctors, dentists and nurses
- Hospitals and nursing homes
- Insurance premiums paid with after-tax money
- Long term care premiums-taxpayer
- Long term care premiums-spouse

<input type="checkbox"/>	Hearing aids, glasses, contacts	
<input type="checkbox"/>	Other medical equipment and supplies	
<input type="checkbox"/>	Medical miles driven	

Taxes Paid

<input type="checkbox"/>	State, city and local income taxes paid	
<input type="checkbox"/>	State and local sales taxes paid (actual amount)	
<input type="checkbox"/>	Sales tax paid on purchase of vehicles and construction materials	
<input type="checkbox"/>	Real estate taxes paid	
<input type="checkbox"/>	Personal property taxes paid (RTA Excise tax on autos)	

Other Deductions

<input type="checkbox"/>	Mortgage interest paid (attach 1098 form)	
<input type="checkbox"/>	Did you refinance in 2021? (attach closing paperwork)	
<input type="checkbox"/>	Donations to charitable organizations by cash, check, credit card	
<input type="checkbox"/>	Non-cash donations to charitable organizations (clothing, household items, vehicles, etc.)	
<input type="checkbox"/>	Miles driven for charitable purposes	

Credits

Did you purchase a new electric vehicle? Please provide sale paperwork.

Did you install energy efficient improvements (windows, doors, furnace, boiler) to your main home?

Did you install solar equipment?

Please provide a copy of 2019 and 2020 tax returns if we did not prepare them.

Please sign and date below:

Taxpayer

Spouse