

2020

1040

US

Miscellaneous Questions

- | Yes | No | <u>PERSONAL INFORMATION</u> |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2020? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you been a victim of identity theft AND received a Personal Identification Number from the IRS? If so, please provide IRS letter. If you cannot locate your letter visit https://www.irs.gov/identity-theft-fraud-scams/retrieve-your-ip-pin to retrieve your PIN. |

- | Yes | No | <u>DEPENDENTS</u> |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older (or 24 or older if student) at the end of 2020? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2020 with interest and dividend income in excess of \$1,100 or total investment income in excess of \$2,200? |

- | Yes | No | <u>HEALTH CARE COVERAGE</u> |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive IRS form 1095-A? If so, please attach. |

- | Yes | No | <u>INCOME</u> |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse or your dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes? |

- | Yes | No | <u>PURCHASES, SALES AND DEBT</u> |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any personal assets to business use? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property in 2020? If so, please provide total purchase price AND date of purchase for each sale. |

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- | Yes | No | <u>PURCHASES, SALES AND DEBT (continued)</u> |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please <u>provide a copy of the settlement sheet</u> (HUD-1). |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new or pre-owned motor vehicle in 2020? (Do not include leases or purchases from a private party.) If so, <u>please provide the bill of sale</u> . |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts cancelled or forgiven? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does anyone owe you money which has become uncollectible? Do not include normal business receivables unless those amounts have been included previously in taxable income. (If so, please provide details on last page of this Organizer.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? |

- | Yes | No | <u>RETIREMENT PLANS</u> |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or roll over any amount from one retirement plan to another? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA? |

- | Yes | No | <u>EDUCATION</u> |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? If so, was the entire distribution used for qualified college expenses including tuition, books and room & board? ___ Yes ___ No |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university or vocational school? |

- | Yes | No | <u>MISCELLANEOUS</u> |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you apply an overpayment of 2019 taxes to your 2020 estimated tax (instead of being refunded)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to electronically file your tax return? There is no added charge to file electronically. If you choose to not file electronically there will be a \$15 added charge. |
| <input type="checkbox"/> | <input type="checkbox"/> | Has your bank account information changed since last year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to allocate \$3 to the Presidential Election Campaign Fund? |

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Yes No

MISCELLANEOUS (continued)

- Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- May the IRS discuss your tax return with your preparer?
- Were you notified or audited by the Internal Revenue Service or State taxing agency?
- Was your home rented out or used for business?
- Did you have a medical savings account(MSA), Medicare + Choice MSA , or acquire an interest in an MSA or Medicare + Choice MSA due to the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received accelerated death benefits from a life insurance policy?
- Do you want to deduct medical expenses? If so, please provide the total amount of out-of-pocket medical expenses paid in 2020 (there will be an additional charge if you would like us to add up your receipts). Do not include expenses paid through a pre-tax flexible spending account or pre-tax health insurance. If no information is provided we will assume that there was no significant amount of expenses to deduct.

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- Do you participate in a pre-tax dependent care reimbursement account?
 - Did you engage the services of any household employees? (Does not apply to monthly cleaning or landscaping service.)
 - Did you pay for your automobile registration in 2020? If yes, please list the "VLT" portion and vehicle description below. Remember to include any vehicles sold or traded in during the year. To find your 2020 VLT visit Service Arizona MVD at <https://servicearizona.com/webapp/feeRecap/>

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- Do you deduct business mileage? If yes, enter below your odometer's beginning and ending mileage as of January 1, 2020 and December 31, 2020, respectively. Report each vehicle separately. Additional vehicle information will be entered elsewhere.
Beginning: _____
Ending: _____

- Did you or your spouse make any gifts to an individual that total more than \$15,000, or any gifts to a trust?

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Yes No MISCELLANEOUS (continued)

- During 2020 did you make at least \$300 in monetary (cash, check, or credit card) charitable contributions and have receipts to support those amounts (note: don't include donations qualifying for any of the Arizona tax credits)?
- Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?
- Did you receive, sell, send, exchange or otherwise acquire any financial interest in virtual currency?

Yes No CORONAVIRUS AID, RELIEF AND ECONOMIC SECURITY ACT (CARES ACT)

- Did you receive an economic impact payment? If so, how much?
- Did your business have any PPP loan amounts forgiven?
- Did you receive a distribution from your retirement plan because of COVID?

Yes No ARIZONA SPECIFIC QUESTIONS

- Did you make a contribution to a Section 529 college savings account? If so, please provide the total amount contributed in 2020 and the name of the account beneficiary.

- Did you make contributions to a public or charter school for support of extracurricular activities (up to a \$400 Arizona credit) or did you make contributions to a school tuition organization that provides scholarships or grants to qualified schools (up to a \$2,365 Arizona credit)?

If you answered "Yes" to the above question, please indicate the name and address of the school/organization and the amount contributed:

- Did you donate to an Arizona "Qualifying Charitable Organization" (working poor and/or foster care)? (An Arizona credit of up to \$800 may be allowed for donations to a qualifying charity and \$1,000 for donations to a foster care charity.)