

<b>Tax Organizer - Income and Deductions:</b>		
<b>2021 Special Items:</b>		<b>2021 Tax Year</b>
Advance Child Tax Credit Payments (see IRS Letter 6419)	\$ -	
2021 Stimulus Check (EIP#3 Only!)	\$ -	
Gifts to Charity (see below)	\$ -	List Below
Bank Info on file - any changes from last year? Circle Y or N (provide new info)		
Address on file - same as last year? Circle Y or N (provide new info)		
Filing status - same as last year? Circle Y or N (provide new info)		
Dependents claimed - same as last year? Circle Y or N (provide new info)		
Any major life events for 2021? Y or N (provide details if applicable)		
	<b>2020 Tax Year</b>	<b>2021 Tax Year</b>
<b>Income:</b>		
Wages (see W-2)		
Interest Income: (see 1099-Int)		
Dividend Income: (see 1099-DIV)		
IRA Distributions (see 1099-R)		
Pension Income (see 1099-R)		
Unemployment Income (see 1099-G)		
Stimulus Payment 2021 (EIP#3)	\$ -	
<b>Adjustments to Income:</b>		
IRA Contribution:		
IRA Contribution (spouse):		
Student loan interest deduction		
<b>Itemized vs. Standard Deduction = \$12,550 Single / \$25,100 MFJ</b>		
State and local income taxes paid		
Real Estate Taxes - principal residence		
Personal property taxes - non business (car tabs)		
Mortgage Interest		
Mortgage points (refi)		
Gifts to charity - cash or check		
Gifts to charity - non-cash		
Unreimbursed Employee Expenses: (Only deductible on MN Return)		
Business Miles		
Total Miles for the year		
Vehicle Description:		
Other		
Other		