

WELLER CONSULTING

Weller Consulting USCC
12220 Birmingham Hwy.
Bldg 30
Milton, GA 30004

Phone/Fax: (888)327-9306
Email: tax@wellerconsulting.com

Thank you for selecting our Business and Tax Services from Weller Consulting USCC. Our passion is to educate our clients to help them live their life in a more tax-deductible way. We take pride in our ability to make certain that every client receives direction and service based on their individual needs.

1. SUMMARY OF SERVICES

For Individuals

Tax Services

- ✓ Federal and State Income Tax Preparation (1040, 1040A, 1040EZ)
- ✓ Electronic Filing of Tax Returns
- ✓ Amended Returns
- ✓ IRS Problem Resolution
- ✓ Tax Education -Personal Consultation & Seminars
- ✓ Advanced Tax Strategies and Planning
 - Tax Action Planner - develops customized strategies that detail the specific steps you need to take to start saving thousands in taxes.
 - IRA Recovery - will allow you to have direct control over your IRA investments.

For Businesses

Tax Services

- ✓ Federal and State Income Tax Preparation for:
 - Sole Proprietorships
 - S-Corporations
 - C-Corporations
 - Partnerships, LLCs, LLPs,
- ✓ Amended Returns
- ✓ IRS Problem Resolution
- ✓ Tax Education - Personal Consultation & Seminars
- ✓ Advanced Tax Strategies & Planning
 - ❖ Total Business Analysis - an in-depth look at your past, current and future financial goals that analyzes where you are in your business and maps a strategy on how to get where you want to go. It includes the Tax Action Planner, an efficiency review of your accounting procedures, a tax education consultation and an advanced tax strategy planning consultation. A complimentary review of your past three year's tax returns is required as a pre-requisite.
 - ❖ Tax Action Planner - develops customized strategies that detail the specific steps you need to take to start saving thousands in taxes.
 - ❖ IRA Recovery - will allow you to have direct control over your IRA investments.

Business Services Available

- ✓ QuickBooks Setup
- ✓ Accounting
- ✓ Bookkeeping
- ✓ Complete Payroll Services and Year End Reporting for W-2 employees and 1099 contractors
- ✓ New Business Start-ups
- ✓ Incorporation of New C-Corporations, S-Corporations, LLPs, & LLCs
- ✓ Corporation Minutes & By Laws
- ✓ Registered Agent Services

2. NEW CLIENT PROCEDURES

- All new clients are encouraged to call for a free 30-minute consultation with one of our tax professionals.
- We offer a free review of your most recently filed tax return. Our experience shows us that approximately 70% of business owners and 20% of other income earners overpay their taxes by not fully understanding the law. If we determine that you have overpaid your taxes by more than double of what the tax preparation fees would cost you, you may want to have the tax return amended. We can also help you amend your tax returns to correct any understatement of taxes that is discovered in order to be in compliance with the tax laws.

3. TAX ORGANIZER - *Tax preparation clients must complete or provide an Equivalent source of information or hourly charges could also apply.*

THIS IS THE MOST IMPORTANT STEP IN THE PREPARATION OF YOUR TAX RETURN.

Our Tax Organizer is the beginning point in establishing a relationship with you so that we may understand your unique tax situation. It is a systematic series of YES and NO questions that have been designed to help us prepare your tax return so that you pay the least amount of taxes. Please do not be overwhelmed the number of organizers. Many areas will not apply to you and you need only fill out the ones that are appropriate for you. Once you begin answering the questions you will realize how the process flows and before you know it, you will be finished!

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. It may be necessary to ask you for clarification of some of the information; however, we will not audit or otherwise verify the data you submit. Our work in connection with the preparation of your income tax return does not include any procedures designed to discover misappropriation of money or other irregularities, should any exist. Should we have to render accounting and bookkeeping assistance necessary for preparation of the income tax returns this will be charged at a rate above your tax preparation fee. You should retain all the documents, cancelled checks and other data that form the basis of income and deductions for a minimum of (7) years. These may be necessary to prove the accuracy and completeness of your returns to a taxing authority. You have the final responsibility for your income tax returns. Therefore, be sure to review them carefully before you sign them.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authority interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

It is essential that you complete the Tax Organizer before you fax or send it to our office. Additional charges will be incurred for bookkeeping and consultation services necessary to compile information you do not provide in the Tax Organizer or if information is otherwise incomplete to prepare your tax return.

4. ADDRESS, PHONE NUMBER & E-MAIL ADDRESS CHANGES

It is important that you notify us of all address, phone number and e-mail address changes.

5. OFFICE HOURS

Monday - Friday: 9:00 AM to 5:00 PM EST.

6. DEADLINES

1040 – INDIVIDUAL (see note below)		
SUBMIT INFORMATION TO WELLER CONSULTING USCC By:	IRS FILING DEADLINE	*EXTENSIONS
March 15th	April 15th	ONE SINGLE EXTENSION FILED BY APRIL 15TH WILL EXTEND THE DUE DATE TO OCTOBER 15TH
September 15th	October 15th	NO ADDITIONAL EXTENSION IS AVAILABLE.

CORPORATE with tax years ending 12/31 (see note below)		
SUBMIT INFORMATION TO WELLER CONSULTING USCC By:	IRS FILING DEADLINE	*EXTENSIONS
February 15th	March 15th	ONE SINGLE EXTENSION FILED BY MARCH 15TH WILL EXTEND THE DUE DATE TO SEPTEMBER 15TH
August 16th	September 15th	NO ADDITIONAL EXTENSION IS AVAILABLE.

PARTNERSHIPS, LLCs or LLPs with tax years ending 12/31 (see note below)		
SUBMIT INFORMATION TO WELLER CONSULTING USCC:	IRS FILING DEADLINE	*EXTENSIONS
February 15th	March 15th	ONE SINGLE EXTENSION FILED BY MARCH 15TH WILL EXTEND THE DUE DATE TO SEPTEMBER 15TH
August 16th	September 15th	NO ADDITIONAL EXTENSION IS AVAILABLE.

LLC's: LLC's can be taxed in several ways depending on their unique structure. Please note that their deadline will be the same as the entity type they have elected to be taxed as. Please call our office with any questions. (See note below.)

FISCAL YEAR ENTITIES: All entities not using the calendar year: Your deadline to submit complete paperwork to Weller Consulting USCC is four weeks prior to your IRS filing deadline. (See note below.)

NOTE: We can only guarantee meeting the above IRS deadline if the information submitted to Weller Consulting USCC is **COMPLETE** and provided to us by the dates indicated in the first column. **There will be a \$150 rush fee added to any return whose information was not submitted to us by our deadline for information submission but is requesting an on time filing by our firm to comply with the IRS filing deadlines.**

***EXTENSIONS:** An extension is a request for additional time to file a tax return, NOT additional time to pay your taxes. **If you owe taxes and file an extension without sending a payment, the IRS may assess penalties and interest on the delinquent taxes. If we currently are working on your taxes and don't have all the required information to complete the return by the due date, we will automatically file an extension for you.**

7. ESTIMATED QUARTERLY TAX PAYMENTS (1040ES, 1120ES) AS WELL AS STATE TAX PAYMENTS IF REQUIRED (ie. 500ES for GA)

We strongly encourage all business owners, C-Corporations and LLC's taxed as C-Corporations to have quarterly evaluations of their tax situation. This is imperative for helping you to avoid penalties and interest payments.

Estimated quarterly tax payments for 2020 are due to the IRS by **March 15th, June 15th, September 15th, and January 17th, 2022.**

8. STATE TAX

Other States: We prepare state tax returns for all states where required. Generally we prepare your state tax return automatically at the time your taxes are prepared.

9. PROCESSING TIME

Current Tax Year: Our office will process all returns on a first come, first serve basis. Since all work is customized, each return may take a different amount of processing time. If all the information provided is complete, it will take at a minimum of two (2) business days to prepare, however, the actual time will depend upon having complete information and your response time to requests for missing data. To expedite the process please:

- Answer every question with all the required information and make sure that The Tax Organizer you provide to Weller Consulting USCC is complete.
- Provide any additional information requested by Weller Consulting USCC as soon as possible, but no longer than three (3) days from the initial request.
- Call our office for assistance or clarification when needed in completing the organizers.

Amended and Previous Years Returns: Amended and previous years tax returns are done strictly on an as-time-allows basis. Generally, amended and previous years returns are not processed by Weller Consulting USCC during heavy tax deadline periods but will be considered after the initial tax season is complete. **Note:** The IRS will take approximately 90 days to process amended returns and all individual amended returns must be mailed in for processing.

10. IRS CORRESPONDENCE

In the event that you receive a notice from the IRS for any reason, please mail or fax a copy of it to our office immediately. **DO NOT CONTACT THE IRS DIRECTLY AND DO NOT PAY ANY BALANCES REQUESTED UNTIL OUR OFFICES CAN REVIEW THE SITUATION. IF THE NOTICE IS A RESULT OF SOMETHING OUR OFFICE OVERLOOKED, THERE WILL BE NO CHARGE FOR TIME SPENT RESOLVING THE ISSUE. IF THE NOTICE IS NOT THE FAULT OF OUR OFFICE, WE WILL CHARGE A SET FEE FOR HANDLING AND RESOLVING THE ISSUE UNLESS YOU HAVE OPTED IN FOR THE AUDIT PROTECTION PLAN FOR THE YEAR IN REVIEW.**

11. FEES & SERVICES

Tax Preparation: Charges are based on the complexity and amount of time required to prepare your return. Upon receiving your package of information we will provide you with an estimate of the cost to prepare your return and will get some agreements to sign prior to our proceeding to work on your return. While it is impossible to give exact estimates for preparing a return without information of what is involved, below will give you likely price ranges for common tax situations for IRS returns:

- \$225 - \$495 per tax year for a basic return without a business
- \$450 - \$650 per tax year if you have one home-based business* (Schedule C)
- \$795 per tax year for a corporate return* (1120, 1120S)
- \$695 per tax year for a partnership return (1065)
- \$695 per tax year for Trust return (1041)
- \$595-\$895 per tax year for Exempt Organization return (990ez, 990)

*Multiple businesses, bookkeeping, accounting or other situations will incur additional costs. One state return will be included in the above prices. Any additional states required will incur an additional fee of \$85 per state.

Tax Return Amendments: We will provide the service of amending previous years tax returns on an as time allows basis.

\$350 - \$550 per tax year for amended return (1040, 1040EZ)
\$695 per tax year for corporate amended return (1120, 1120S, 1065)

State Tax Preparation: We provide state tax returns for any state that might be needed. Our fee is \$85 per state tax return prepared.

Retainer Fees: – If you are a new client to Weller Consulting, we will as a normal process require a retainer fee to start the preparation process. This will be applied towards the final preparation costs.

Tax Filing Extensions: FREE for our clients

E-file: FREE for both Federal & State if we prepare your return, otherwise \$65 Federal, \$45 State.

Fee Collect Service: Fee collect is a service we offer to our clients. It allows you to have your tax preparation fees deducted from your IRS refund without having to pay upfront costs before e-filing. The cost is \$55.

Shipping & Handling: Client is responsible for getting all items needed for tax return preparation to our office. Should our clients choose to have their documents and any original backup documents mailed back to them instead of picking up at one of our office locations, shipping fees of \$5 will apply and will be added to your tax return preparation fee. This is in addition to any rush fees that may be added to your return for late submission of information.

Copies of Tax Returns: We will provide clients with an electronic copy of all tax return(s) done by our company that will be stored in the clients' secure online portal. The information will be available 24/7 to all clients via a personal login. If you would like a hard copy, we will gladly provide them for a service fee of \$15.

QuickBooks:

-Set-up Starts at \$250

Bookkeeping: We provide monthly or quarterly bookkeeping services starting at \$500/mth.

Payroll Services:

-Set-up \$250 one-time fee per company.

-Monthly Fees Starts at \$150 per month. Can be customized to your needs

12. PAYMENT POLICY

- A retainer fee may be required for New Clients to begin the desired service.
- Payment of all tax preparation services is **due in full upon completion and before e-file** of return or receipt of filing copy unless you are using the Fee Collect service we offer.
- Credit Cards accepted are MASTERCARD, VISA, DISCOVER or AMEX
- Payment by a personal or business checking account is also accepted and will be processed online just as a credit card electronically. We do NOT encourage paper checks to be mailed to our offices due to the time sensitivity of filing the returns which are to be paid PRIOR to filing.

All invoices are due and payable upon receipt and must be paid PRIOR to the filing of your tax returns. Should any invoice be open past thirty (30) days, in accordance with the laws of the State of Georgia, finance charges will accrue at 15% per month or portion thereof on any balance due on work that is held. In the event of non-payment for services, the client will be responsible for all costs and fees of the collection process, including attorney and court costs necessary to collect the debt if applicable.

13. OUR PRIVACY POLICY

We obtain private personal information about you from the following sources:

- We receive information from you on any applications, tax processing worksheets, miscellaneous documents or any other forms that we use to prepare your income tax return;
- Information regarding your business dealings with us or others; and

There will be no disclosure of any private or nonpublic personal information about you to any outside sources, except as permitted by law when you have given written permission and have requested.

If for any reason you decide not to continue as a client of our practice, we will continue to abide by the privacy policies and practices as detailed in this notice.

Access to your personal account is restricted to those employees who must know certain information about you in order to provide appropriate required services.

14. HOW TO GET YOUR TAX INFORMATION TO US

We try to make filing your taxes with us as easy and convenient as possible so we offer several ways in which you can get your information to us:

- Mail your tax organizers and **copies** of your original tax forms to us at: 12220 Birmingham Hwy, Bldg 30, Milton GA 30004 **OR** our PO Box 676, Alpharetta GA 30009. **(Please do NOT send us original forms)**
- Fax all organizers and required W2's, 1099's, etc. to 1-888-327-9306 or 678-623-0588.

- Meet with us in person to discuss any items and give us your documents. **We Have three (3) locations to meet with you this year in Milton, Roswell and Dunwoody.**
- Scan and upload your documents securely on our website thru the Secure Portal link, or an email link emailed to you, or thru your own secure client portal which you can access at the Weller Client Login link on our website.
- Email your PDF documents to tax@wellerconsulting.com

We are always here to assist you with any questions or concerns you may have about our service, our process, or how to fill out the tax organizers. Your confidence in our ability to provide you with highest quality of service is very important to us. Should you have any questions, please give us a call at 1.888-327- 9306 or 678-813-5292.

15. HOW TO CONTACT US

Mailing Address: Weller Consulting, 12220 Birmingham Hwy, Bldg #30, Milton GA 30004

Phone: 1.888.327.9306 (24/7)

Local: 678-813-5292

Fax: 678-623-0588

Web Page: www.wellerconsulting.com

E-Mail: tax@wellerconsulting.com

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2020 individual income tax return. **If you have any business entities other than a sole proprietorship, or LLCs treated as a sole proprietorship, please complete the Business entity organizer for the information that applies to those entities.** The attached worksheets cover income, deductions, and credits and will help us in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2020 information in the designated areas on the worksheets. If you need to include additional information please include additional pages.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer yes to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- A copy of your 2019 tax returns or last filed year (if we did not complete them).
- Copies of any W2s or other compensation, health insurance or pension documentation, such as Form 1099MISC, Form 1099NEC, Form 1099R or Form 1095A, B or C.
- Schedule(s) K1 showing income or loss from partnerships, S corporations or estates or trusts.
- Form(s) 1099DIV or 1099INT or statements reporting dividend and interest income. Brokerage statements showing all transactions for stocks, bonds, etc.
- Form(s) 1098 (reporting interest paid) copies of real estate tax bills and other information relating to real property holdings.
- Copies of closing statements regarding the sale or purchase of real property. If you had a sale, please include the original purchase document as well.
- All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer so that we can better serve you and make sure you pay only the taxes you are legally required to pay.

2020 TAX ORGANIZER

Taxpayer Information

Last name _____
 First name _____
 Middle Initial _____
 Social security number _____
 Date of birth _____
 Occupation _____
 Work phone _____ Cell phone _____ Email _____
 Address _____
 City _____ State _____ Zip Code _____
 Home phone _____ Fax Number _____

Spouse Information

Last name _____
 First name _____
 Middle Initial _____
 Social security number _____
 Date of birth _____
 Occupation _____
 Work phone _____ Cell phone _____ Email _____

Dependents

First Name	MI	SSN	Date of	Months lived	Childcare
Last Name	Suffix	Relationship	Birth	With Taxpayer	Expenses

CHILD AND DEPENDENT CARE & EDUCATION EXPENSES

Name	Address	ID #	Phone #	Amount Paid	What Dependent

Education Tuition and Fees

Students First Name	Students Last Name	MI	SSN	Qualified Expenses

Student Loan Interest Paid

Enter total 2020 qualified student loan interest paid (should have been issued a 1098T)

Taxpayer _____

Spouse _____

Dependent _____

Attach Form(s) W2 - Wages, Salaries, Tips and Other Compensation

Employer Name(s)

You

Spouse

Attach Form(s) 1099INT - Interest Income

1099INT Payer Name

Interest You Received But You Did Not Receive a 1099

Payer Name

Interest Received

Payer Name	Interest Received
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Attach Form(s) 1099DIV-Dividend Income

1099DIV Payer Name

Attach Any Form 1099INT or 1099DIV issued to your children

Childs Name

1099 Payer Name

Childs Name	1099 Payer Name
<hr/>	<hr/>
<hr/>	<hr/>
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<hr/>	<hr/>

Attach Form(s) 1099MISC-Miscellaneous Income

1099MISC Payer Name

If you have a Sole Proprietorship Business (this includes Single Member Disregarded LLCs) please complete the Sole Proprietor Income and Expenses Organizer.

Attach Form(s) 1099B, Sales of Stocks, Bonds and Securities

1099-B Issuer

Also please complete the Sales of Stocks and Securities Organizer.

Attach Form(s) 1099S, Sales Real Estate

Address(es) of property sold

Please also attach the closing statement for both the purchase and sale of the property. If you did a 1031 exchange then also attach a copy of the report from your Qualified Intermediary.

Attach Form(s) 1099R - Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAS, etc

1099R Payer Name

Attach Form(s) SSA1099 - Social Security/Railroad Benefits

	Taxpayer	Spouse
Social Security Benefits from Form SSA1099	_____	_____
Railroad Retirement Benefits from Form RRB1099	_____	_____
Medicare B premiums withheld	_____	_____

Other Government Forms to attach:

Form(s) 1099C — Certain Government Payments, Form(s) W2G — Gambling or Lottery Winnings, Form(s) 1099Q — Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability Income, etc.

Retirement Plan Contributions

	Taxpayer	Spouse
Traditional IRA contributions made for 2020	_____	_____
Roth IRA contributions made for 2020	_____	_____
SEP, Individual 401(k) or SIMPLE Contributions	_____	_____

	Taxpayer	Spouse
Educator Expenses	_____	_____

(Eligible educators may deduct up to \$250 for books, supplies and materials used in their class room. An Eligible educator is a person who is a K – 12th grade teacher, instructor, counselor, principle or aide who spends at least 900 hours per school year)

Health Savings Account Contribution	_____	_____
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Medical and Dental Expenses

Amount

Prescription medications	_____
Health insurance premiums	_____
Doctors, dentists, etc	_____
Hospitals, clinics, etc	_____
Eyeglasses and contact lenses	_____
Miles driven for medical purposes	_____
Other medical and dental expenses:	_____
_____	_____
_____	_____

Taxes

Real estate taxes paid on principal residence	_____
Real estate taxes paid on additional homes or land	_____
Auto license registration fees based on the value of the vehicle	_____
Other personal property taxes	_____

Interest Expenses

Home mortgage interest paid on personal residence or vacation home **(not investment properties)**– **Attach Form(s) 1098**. Please note that you may only deduct interest on acquisition mortgages of \$1,000,000 or less and home equity loans of \$100,000 or less. Please indicate loans over these limits

Lender Name	Amount
_____	_____
_____	_____
_____	_____

Points paid on loan to buy, build or improve main home

Lender Name	Amount
_____	_____
_____	_____

Rules for deducting charitable contributions

The rules for charitable deductions have become much stricter than in past years. **New for 2020, even if you do not itemize deductions, you are eligible to take a charitable contribution deduction up to \$300 based on donations.**

For Cash and Credit Card Contributions

No deduction will be allowed for contributions of cash, checks, or other monetary gifts, regardless of the amount, unless you have either 1) a bank record (canceled check), 2) a receipt, letter or other written communication from the donee, indicating the donee's name, and the contribution date and amount.

For contributions of \$250 or more you must substantiate it by a contemporaneous written acknowledgement from the donee. Generally the acknowledgement must contain the amount of the contribution and a good faith estimate of the value of any goods or services received in exchange for the contribution.

For Noncash Contributions

Donations of clothing or household items that are not in "good" used condition or better will only be allowed if the item has a value of more than \$500 and a qualified appraisal is attached to the return. The donation of qualified vehicle (car, truck, boat or aircraft) valued at over \$500 must be substantiated with a form 1098C issued by the donee. The form 1098 must be attached to the tax return.

For donations with a value of less than \$250 you must have a receipt from the donee indicating the donee's name, the date and location of the donation, and a detailed description of each donated item (the value is not required to be on the receipt).

For donations with a value of \$250 or more must be substantiated by a contemporaneous written acknowledgement from the donee. Generally the acknowledgement must contain a detail description of the item contributed and a good faith estimate of the value of any goods or services received in exchange for the contribution.

For donations of more than \$5,000 must also attach a qualified appraisal to the tax return.

Charitable Contributions – Cash or Credit Card

Charitable Organization	Amount
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Non Cash Charitable Contributions

Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property. (If the total of all of your non-cash contributions are above \$500, please make sure you submit copies of the donation receipts that include the name and address of the donor and how you obtained the items initially)

Miscellaneous Deductions (do not include expenses for your sole proprietorship)

Miscellaneous Deductions

Tax return preparation fees _____

Investment counsel and advisory fees _____

Certain attorney fees (please describe purpose) _____

Safe deposit box rental _____

Gambling losses (to the extent of gambling income) _____

IRA custodial fees _____

Other miscellaneous deductions (list): _____

ACA Healthcare Questions

Yes No

1. Did you, your spouse or any dependents have health insurance that was subsidized by Health & Human Services (www.healthcare.gov)?

If YES, please include a copy of form 1095 which will show any subsidies you or your spouse or dependents may have received that will need to be reconciled on your 2020 tax return.

General Questions

Yes No

1. Did you purchase a motor vehicle or boat during 2020?
If yes, attach documentation showing sales tax/Ad Valorem paid.
2. Did your marital status change during 2020?
If yes, explain: _____
3. Were you or your spouse permanently and totally disabled in 2020?
4. Do you have dependents who must file their own return?
5. Do you have children under age 18 with investment income greater than \$1,050 or earned income greater than 6,300?
6. Did you provide over half the support for any other person during 2020 not shown on your return as a dependent?
7. Did you incur adoption expenses during 2020?
8. Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?
9. Did you convert all or part of a regular IRA into a Roth IRA?
10. Did you receive any disability payments in 2020?
11. Did you operate an unincorporated business?
(If yes, please complete the Sole Proprietor Business Income and Expense Organizer)
12. Are you a Realtor© who receives a 1099 under your social security number?

(If yes, please complete the Realtor Income and Expense Organizer)

General Questions

Yes No

13. Did you start or operate an S corporation, Partnership or Limited Liability Company in 2020?

(If yes please complete the appropriate business entity organizer)

14. Did you use an automobile for your business in 2020?

(If yes, please complete the Car and Truck Organizer)

15. Did you maintain a home office in 2020?

(If yes, please complete the Home Office organizer)

16. Did you receive tip income not reported to your employer?

17. Do you own rental or investment real estate?

(If yes, please complete the Rent and Royalty Income and Expense Organizer for each property And include current year purchase documents, if applicable and mortgage interest statements)

18. Did you buy, sell or refinance a principal residence or other real property in 2020?

(If yes, attach closing or escrow statements)

19. Did you invest in oil and gas? **If yes please send K1**

20. Did you invest in any partnerships? **If yes, please send K1(s)**

(K1's typically come late so it is OK to send them later)

21. Did you incur any casualty or theft losses during 2020

Including any insurance claim? **If yes, provide details**

22. Did you incur any non-business bad debts?

23. Did you pay any individual for housecleaning in 2020 and you want to report it to IRS?

24. 24 Did you buy or sell any stocks or bonds in 2020?

(If yes, please complete Sales of Stocks and Securities Organizer)

25. Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?

26. Did you receive any income not included in this Tax Organizer?

(If yes, please attach information)

27. Were you notified by the IRS or state taxing authority of changes to a prior year's return?

(If yes, enclose copy of notice or report)

28. Do you expect your income and deductions in 2021 to be the same as 2020?

(If no, attach explanation of changes expected)

General Questions (Continued)

29. If you paid any alimony, enter the following:

Recipient's SSN: _____ Alimony paid: _____ Date of Divorce: _____

30. Enter your home tax state of : Taxpayer _____ Spouse _____

Electronic Filing and Direct Deposit of Refund

All tax returns prepared by our firm are required to be filed electronically unless they contain a form that is not accepted electronically OR if the taxpayer refuses electronic filing. If you refuse electronic filing, please contact us to let us know.

The Internal Revenue Service is able to deposit most all refunds directly into taxpayer's accounts.

Yes No

If you receive a refund would you like direct deposit

If yes, please provide a voided check (not a deposit slip).

What type of account is this Checking [] Savings []

Is this account outside the US?

If you are receiving a refund from IRS, would you like to take advantage of our Fee Collect service that allows you to pay your tax preparation fees from your tax refund with **NO UPFRONT FEES?**

The Fee is \$55 that will be deducted from your Federal Refund

Estimated Taxes Paid

Date Federal State State Local

Additional Information

(Enter any additional information here and attach any documents.)