income ta	Organizer is designed to help you collect and report the information needed to prepare your 2020 ax return. The attached worksheets cover income, deductions, and credits, and will help in the on of your tax return by focusing attention on your special needs.
	nter your 2020 information in the designated areas on the worksheets. If you need to include additional on, you may use the back of a worksheet or an additional page.
When pos	ssible, 2019 information is included for your reference. You do not need to make any 2019 entries.
designed	e General Questions and Business/Investment Questions worksheets include a variety of questions to assist in completing your tax return. If you answer <b>yes</b> to any of the questions, be sure to provide cable details.
Please pro	vide the following information:
	A copy of your 2019 tax return (if not in our possession).
	Original Form(s) W-2.
	Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
	Copies of other compensation or pension documentation, such as Form 1099-MISC, Form 1099-R, or Form 1099-NEC
	Form(s) 1099 or statements reporting dividend and interest income.
	Brokerage statements showing 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.
	All other information notices you received, or any items you have questions about.
Thank you	for taking the time to complete this Tax Organizer.
	Michael R Feight Accounting Service 268 West Beaver Street York, PA 17406
	Telephone: (717)478-1272 Fax: (717)288-1290 E-mail: mfeight@feighttax.com

### **Michael R Feight Accounting Service 268 West Beaver Street** York, PA 17406

Telephone: (717)478-1272 Fax: (717)288-1290 E-mail: mfeight@feighttax.com

## 2020 **TAX ORGANIZER**

Taxpayer Information	1		Spouse	Information	
Last name		Last name	····· –		
First name		First name	····· –		
Middle Initial	Suffix	Middle Initial	····· _		Suffix
Social security number		Social security	number	·····	
Occupation		Occupation			_
Work phone					Ext
Cell phone		Cell phone			
E-mail address		E-mail address	S		
Date of birth					
Address				_ Apartment nun	nber
City				ZIP Code	
Home phone		number			
Dependent Information					
First name	М	Social Security Number	D-4-		Child Com
Last name	Suffix	Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense
Child and Dependent Care Provider Ex	penses	1		'	
Name		Address		ID Number	Amount Paid
Education Tuition and Fees			,	'	
Attach all Form 1098-Ts and a list of your qualified e	ducation expens	ses.			
Student Loan Interest Paid					
Enter total 2020 qualified student loan interest					

## 2020 Income

Attach Form(s) W-2 — Wages, Salaries, Tips and Other Compensation  Employer Name		2019 Amount
Attach Form(s) 1099-R — Distributions from Pensions, Annuities, Retirem	ent, Profit-Sharing	յ, IRAs, etc
1099-R Payer Name		2019 Amount
Attach Form(s) SSA-1099 – Social Security/Railroad Benefits	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099		
Railroad Retirement Benefits from Form RRB-1099		
Medicare C premiums withheld		
Medicare D premiums withheld		
Attach Form(s) 1099-MISC — Miscellaneous Income and 1099-NEC 1099-MISC Payer Name and 1099-NEC Payer Name		
Attach Form(s) 1099-INT — Interest Income  1099-INT Payer Name		2019 Amount
Attach Form(s) 1099-DIV — Dividend Income		2019 Amount
- Topy-Div Layer Name		
Attach Form(s) 1099-B, 1099-S — Sales of Stocks, Bonds, Real Estate, etc  Attach all stock sale transaction information, including initial cost information.		
Other Government Forms to attach: Form(s) 1099-G — Certain Government Payments, Schedule K-1s — Partnership, S-Corporat Gambling or Lottery Winnings, Form(s) 1099-Q — Payments from Qualified Education Progra		come, Form(s) W-2G
Other Income:		
Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and extended a list of all new equipment acquired this year, including date of purchase and cost.	xpenses for any business,	rental or farm you owr
Potiroment Plan Contributions	Taxpayer	Spouse
Retirement Plan Contributions		
Traditional IRA contributions made for 2020		
Roth IRA contributions made for 2020		
SEP, Keogh, Individual 401(k) or SIMPLE Contributions		

# 2020 Deductions

2020 Amount	2019 Amount  2019 Amount
2020 Amount 2020 Amount	2019 Amount
2020 Amount 2020 Amount	2019 Amount
2020 Amount 2020 Amount	2019 Amount
2020 Amount  2020 Amount	2019 Amount
2020 Amount 2020 Amount	2019 Amount
2020 Amount	2019 Amount
2020 Amount	
	2019 Amount
2020 Amount	
2020 Amount	2019 Amount
n, date acquired and	date contributed,
2020 Amount	2019 Amount
	2020 Amount

2020 Questions

							•	Yes	No
1	Did you receive	an Economic Impact (	Stimulus) Payment?						
	If yes, how much	ch did you receive?							
2	Did a lender ca	ncel any of your debt in	n2020? (Attach any	Forms 1099-A or 1099	-C)				
3	Did you make e	energy efficient improve	ements to your home	or purchase any ener	gy-savi	ng property during 2	020? If <b>yes</b> , please		
4	Did you purchas	se a motor vehicle or b	oat during 2020 ?						П
		ocumentation showing						_	
5	Did you purchas	se a hybrid or electric v	ehicle in 2020? If <b>ye</b>	<b>s,</b> enter year, make, n	nodel, a	and date purchased:			
								Ц	
6	,	a vehicle in 2020? If y	,						
7	What was the s	ales tax rate in your lo	cality in 2020 ?	%	State	ID			
8	If <b>yes</b> , explain:	I status change during:	2020?						Ш
9		ur spouse permanently	and totally disabled	in 20202					
10		ependents who must file							H
11	-	ildren who are under a							H
12	-	over half the support f	-	-					H
13		doption expenses durin							H
14	-	a total distribution from	-						
. ~	or qualified plan	n within 60 days of the	distribution?						
15	Did you receive	any disability payment	ts in2020?						
16		tip income not reporte							
17 a	Did you buy, se	ell, refinance, foreclose ents, 1099-C or 1099-A	or abandon a princip	pal residence or other	real pro	operty in2020 ? If <b>ye</b>	es, attach closing or		
b		me, did you claim the I							П
18	•	ny casualty or theft loss	•	, ,				_	
19		ny non-business bad de							H
20	-	y individual for domesti							H
21		retirement account dist						=	Ħ
22		sell any stocks or bond							
23		proceeds from Series						_	П
24		ny moving expenses? I							П
25		any income not includ	-					_	П
	If yes, please a	ttach information.							
26		your income and deduc		ne same as 2020 ?					
27		planation of changes e		on Statement)? If an	oloooo <i>i</i>	atta ah			
		Form 1095-A (Health I ring 2020, did you sell,							H
		n a Paycheck Protection						Н	Н
25	-	y portion of that loan b	• ,					H	H
30		alimony, enter recipier	nt'e SSNI	Δlimo	ny paid			Ш	
		e of residence					Spouse		
	•						<del></del>		N.
		<b>and Direct Deposit (</b> eligible for Electronic Fi		to file electronically?				Yes	No
		e Service is able to dep						Ш	ш
If yo	u receive a refur	nd, would you like direc	ct deposit?						
-		e a voided check (not a							
		t is this?					Checking Sa	vings	Ш
Esti	mated Tax Pa	id	ı						
		ederal		State	1		Local		
	Date	Amount	Date	Amount	ID	Date	Amount	-	ID_
					1			-+	
								+	
								-	
۸ ما م	ditional Info	mation / atam and	ditional information	hara and attack and t		to \			
AQ(	JICIONAL IMION	mation (Enter any ad	uilional information l	nere and attach any do	ocumen	is.)			
_									
_									

	PERSONAL INFORMATION		
1	Did you receive an Economic Impact (Stimulus) Payment?	Yes	No
2	Did your marital status change during 2020?		
3	Do you want to allow your tax preparer to discuss this year's return with the IRS?  If no, enter another person (if desired) to be allowed to discuss this return with the IRS.  Caution: Review any transferred information for accuracy.  Designee's Name		
	Phone Number Personal Identification Number (5 digit PIN) Po you or your spouse plan to retire in 2021?		
4	Were you or your spouse permanently and totally disabled in 2020?	H	H
5 6		Ш	Ш
7	Enter date of death for taxpayer or spouse (if during 2020 or 2021 ): Taxpayer: Spouse: Spouse:	П	
	DEPENDENT INFORMATION		
		Yes	No
8 a	Do you have dependents who must file?		
	• If yes, do you want us to prepare the return(s)?	П	П
9 a	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,200?		
k	If yes, do you want to include your child's income on your return?		
10	Are any of your dependents <b>not</b> U.S. citizens or residents?		
11	Did you provide over half the support for any other person during 2020 ?		
12	Did you incur adoption expenses during 2020 ?		
	IRA, PENSION AND EDUCATION SAVINGS PLANS		
14 15 16 a	Did you take a retirement account distribution related to the corona virus or a natural disaster?  Did you receive payments from a pension or profit-sharing plan?  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?  Did you convert all or part of a regular IRA into a Roth IRA?  Did you roll over all or part of a qualified plan into a Roth IRA?  Did you contribute to a Coverdell Education Savings Account?	Yes	No
	ITEMS RELATED TO INCOME/LOSSES		
18 19 20 a	Did you receive any disability payments in 2020 ?  Did you receive tip income <b>not</b> reported to your employer?	Yes	No
k	(Attach copies of any escrow statements or Forms 1099.)		
	: Are you planning to purchase a home soon?		
21	Did you incur any non-business bad debts?		
22			
	PRIOR YEAR TAX RETURNS		
23	Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return?	Yes	No

# **General Questions (continued)**

	FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES		
		Yes	No
25	Did you have foreign income or pay any foreign taxes in 2020 ?		
	At any time during2020, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?		
b	Did the aggregate value of all your foreign accounts exceed \$10,000 at any time during 2020? Report all interest income on Org 11		
27	Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust?		
28	Did you at any time during 2020, have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded \$50,000 in value at any time during the year?		
	HEALTH AND LIFE INSURANCE		
		Yes	No
20	Did you receive Form 1005 A (Leelth Coverage)? If an inlease attach		
29	Did you receive Form 1095-A (Health Coverage)? If so, please attach		
	Did you or your spouse have self-employed health insurance?	_	
31	another job?  Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries named by you?		
32	Did you contribute to or receive distributions from a Health Savings Account (HSA)?	=	
	MISCELLANEOUS		
		Yes	No
33	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2020 ? If <b>yes</b> , please attach details		
34	Did you start paying mortgage insurance premiums in 2020 ? If <b>yes</b> , please attach details	_	H
35	Did you purchase a motor vehicle or boat during 2020 ?		П
	If <b>yes</b> , attach documentation showing sales tax paid.		
36	Did you purchase an energy efficient vehicle in 2020 ?	Ш	
37	Did you donate a vehicle in 2020? If yes, attach Form 1098C		
38	What was the sales tax rate in your locality in 2020 ? % State ID		
39	Did you or your spouse make gifts of over \$15,000 to an individual or contribute to a prepaid tuition plan?		
40	Did you make gifts to a trust?		
41	If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association?		
	If <b>yes</b> , please attach details.	_	
42	Did you or your spouse participate in a medical savings account in 2020?		Ш
	If yes, please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)		
43	Did you make a loan at an interest rate below market rate?	Н	
44	Did you pay any individual for domestic services in2020 ?		
45	Did you pay interest on a student loan for yourself, your spouse, or your dependents?		
46	Did a lender cancel any of your debt in 2020 ? (Attach any Forms 1099-A or 1099-C)		Н
47 48	Did you receive any income not included in this Tax Organizer?	_	H
70	If <b>yes</b> , please attach information.	ш	ш
49	$ At any time during 2020, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? \dots \\$		
50 a	Did you obtain a Paycheck Protection Program (PPP) Ioan?		
k	If yes, has any portion of that loan been forgiven?	$\Box$	Ш
	ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND		
		Yes	No
51	If your tax return is eligible for Electronic Filing, would you like to file electronically?		
52	The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	П	
Caut	tion: Review transferred information for accuracy.		_
	If <b>yes,</b> please provide the following information:		
a	Name of your financial institution		
	Routing Transit Number (must begin with 01 through 12 or 21 through 32)		
1	I What type of account is this?		
	Please attach a voided check (not a deposit slip) if your bank account information has changed.		

# **Medical and Tax Expenses**

ORG13

	MEDICAL AND DENTAL EXPENSES	2020	2019
1	Prescription medications		
2	Health insurance premiums (enter Medicare B on ORG10)		
3	Exclude premiums paid through an exchange (Form 1095-A)  Qualified long-term care premiums		
ā	Taxpayer's gross long-term care premiums		
k	Spouse's gross long-term care premiums		
	: Dependent's gross long-term care premiums		
4	Enter self-employed health insurance premiums on ORG19, ORG27, ORG45A, or ORG46A for the appropriate activity		
5	Insurance reimbursement		
6	Doctors, dentists, etc		
7	Hospitals, clinics, etc		
8	Lab and X-ray fees		
9	Expenses for qualified long-term care		
10	Eyeglasses and contact lenses		
11	Medical equipment and supplies		
12	Miles driven for medical purposes		
13	Ambulance fees and other medical transportation costs		
14	Lodging		
15	Other medical and dental expenses:		
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i			
	TAXES	2020	2019
Ente	er state and local income taxes on ORG7, ORG8, ORG10, and ORG40.		
16	Real estate taxes paid on principal residence		
17	Real estate taxes paid on additional homes or land		
18	Auto registration fees based on the value of the vehicle		
19	Other personal property taxes		
	Other taxes:		
20	Other taxes.		

#### Interest Paid and Cash Contributions

**ORG14** 

	5105(10		311 0011	٠	Buttons		ORG 14
	HOME N	IORTGAGE	INTERES	Т	PAID		
Lender's Name			Check on Fo			2020	2019
			OILLO		11030		
POINTS PAID O	N LOAN	TO BUY, BI	JILD, OR	IIV	IPROVE M	AIN HOME	
Lender's Name			Check on Fo	k ii	NOT 1098	2020	
				]	11030		
				_			
							<u> </u>
SELLER FINANCED MORTGAGE							
Individual's Name	lo	lentifying Number				Address	
0	THER PE	RSON RECI	EIVING FO	OF	RM 1098		
Form 1098 Recipient's Nam	ie					Address	
		OTHER P	OINTS				
Enter below any points paid on a home equity lo refinanced mortgage.	oan (other t	nan to improve	your main l	hor	ne), a loan fo	or a second home, o	or a
Lender's Name	Loan Over	Points P	aid D	at	e of Loan	Loan Length (years)	2019 Points Deducted
OHAL	IEIED MC	RTGAGE IN	ICHDANC	`F	DDEMILIM	C	
QUAL		INTUAGE III	ISURANC	, E	REMIUM		0040
Premiums paid in 2020 for qualified mortage in						2020	2019
			1(10 income out		1		1

# **Interest Paid and Cash Contributions (continued)**

**ORG14** 

		•	•	
	INVESTMENT	INTEREST		
			2020	2019
Investment interest (for example: margin for investment, etc)				
	LIMITED HOME MOR	TGAGE DEDUCTION		
If the mortgage meets the following reason				
- The principal amount of you mortgage and a You had home debt that was not used	and home equity debt is over \$7	50,000 (\$375,000 if marri		
	Loan 1 Loan 2	Loan 3	Loan 4	Loan 5
1a Interest paid in 2020				
Points paid in 2020  Months loan outstanding				
Principal pd on loan in 2020.				
<b>b</b> Was all proceeds of this loan used to	buy, build, or substantially impr	ove the home?		
Yes:	No: Yes: No:	Yes: No:	Yes: No:	Yes: No:
2 Home Debt Origination on or after De	cember 15, 2017		T	Υ
Beginning of year balance				
Additional borrowed in 2020				
Enter the amount of debt not used to	buy, build, or substantially impre	ove the home:		r
3 Home Debt Origination after October	13, 1987 and Before December	15, 2017		<u>L</u>
Beginning of year balance				
Enter the amount of debt not used to	buy, build, or substantially impre	ove the home:		,
4 Grandfathered debt: (before 10/14/198	37)		Τ	1
Beginning of year balance	house hould be a substantially income	ava tha hamar		
Enter the amount of debt not used to	buy, build, or substantially impre	ove the nome:	T	Y
	CASH CONT	DIRLITIONS		
	CASH CONT	Check if		
Name of Donee O	rganization	Statement Exists for Gifts \$250 or More	2020	2019
		_		
		1		
		-		
		-  片		
Charitable miles driven				

1555 REV 11/06/20 PRO

# 2020 Tax Documents to Send to Preparer

Gather the following documents to send to your preparer.	