

## **INSTRUCTIONS FOR COMPLETING THE 2021 TAX ORGANIZER**

We are asking you to complete the attached 2021 Tax Organizer and return it to us in order to prepare your 2021 tax returns. The attached 2021 Tax Organizer is personalized for you and was prepared by us based on information used in preparing your 2020 tax returns. You will note that we have highlighted certain areas of the Tax Organizer that need to be completed based on last year's information. However, **you need to review and complete the entire Tax Organizer** as your circumstances may have changed in 2021, especially in light of the COVID-19 pandemic.

Unfortunately, each year your tax return becomes more complex as the IRS requires additional information. If in 2021 you received any Economic Impact Payments, received any Child Tax Credit Payments, sold, sent, exchanged or otherwise acquired any financial interest in any Virtual Currency/Cryptocurrency, or had signatory authority over any Foreign Bank Accounts or owned other Foreign Financial Assets, you will need to complete the relevant Tax Organizer Supplements. You can download the relevant Tax Organizer Supplements from our website (paulmarcianocpa.com) or you can request the relevant Tax Organizer Supplements by contacting our office.

Please note the following instructions/guidance in completing the 2021 Tax Organizer:

1. Review the background information to insure it is accurate and up-to-date, especially your address, phone numbers and email address.
2. When listing wages please report the information found in Box 1 of any W-2 statement you may have received.
3. When reporting distributions from pensions, IRA's or 401(k) plans – report the gross distribution reported in Box 1 of any Form 1099-R you may have received.
4. Report the gross amount of social security payments you may have received as reported in Box 5 of any Form 1099-SSA you may have received.
5. List all Form 1099's you receive and the amount of reported income.
6. Report all interest and dividends received as reported on 1099-INT or 1099-DIV you may have received.
7. If you received unemployment compensation in 2021, even if due to the COVID pandemic, you must report the compensation reported on any 1099-G you may have received.
8. List all of your charitable deductions, both cash and property) because this year you may be able to deduct up to \$300 (\$600 if married) of charitable cash donations even if you use the standard deduction.
9. Answer questions **1-33** on page 4 of the Tax Organizer.
10. Answer all of the questions on the Additional 2021 Tax Organizer Information sheet.
11. If you were self-employed and/or had rental income property, you will need to complete the additional sections of the Tax Organizer relative to both.
12. Complete any Tax Organizer Supplements that are applicable to you.

### **REMEMBER THE FOLLOWING:**

- **YOU NEED TO PROVIDE US WITH ALL THE APPLICABLE SOURCE DOCUMENTATION (e.g., all IRS Tax Reporting Forms, W-2's, 1099's, evidence of health insurance, 1095A, MA1099-HC, real estate taxes, mortgage interest, unemployment compensation, etc.)**
- **YOU NEED TO INITIAL EACH PAGE OF THE TAX ORGANIZER AND SIGN EACH APPLICABLE SUPPLEMENT WHEN YOU RETURN THEM TO OUR OFFICE**
- **YOU NEED TO RETURN THE COMPLETED TAX ORGANIZER, ALL APPLICABLE TAX ORGANIZER SUPPLEMENTS, AND ALL RELEVANT SOURCE DOCUMENTATION BEFORE WE CAN TO PREPARE YOU TAX RETURNS.**

Taxpayer Information		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 ...	Work phone.....	Ext ...
Cell phone .....	_____	Cell phone .....	_____
E-mail address.....	_____	E-mail address .....	_____
Date of birth.....	_____	Date of birth .....	_____
Address .....	_____	Apartment number.....	_____
City .....	State.....	ZIP Code .....	_____
Home phone.....	Fax number .....	_____	_____

Dependent Information					
First name Last name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

**Education Tuition and Fees**  
 Attach all Form 1098-Ts and a list of your qualified education expenses.

**Student Loan Interest Paid**  
 Enter total 2021 qualified student loan interest..... \_\_\_\_\_

Initials: \_\_\_\_\_

**Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation**

2021

2020 Amount

Employer Name

W-2, Box 1 Amt. ->

_____	_____
_____	_____
_____	_____

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

2021

2020 Amount

1099-R Payer Name

_____	_____
_____	_____
_____	_____

**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 B premiums withheld .....	_____	_____
Medicare C premiums withheld .....	_____	_____
Medicare D premiums withheld .....	_____	_____

**Attach Form(s) 1099-MISC – Miscellaneous Income and 1099-NEC**

2021

1099-MISC Payer Name and 1099-NEC Payer Name

_____
_____
_____

**Attach Form(s) 1099-INT – Interest Income**

2021

2020 Amount

1099-INT Payer Name

_____	_____
_____	_____
_____	_____
_____	_____

**Attach Form(s) 1099-DIV – Dividend Income**

2021

2020 Amount

1099-DIV Payer 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-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

**Other Income:**

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

**Retirement Plan Contributions**

Taxpayer

Spouse

Traditional IRA contributions made for 2021 .....	_____	_____
Roth IRA contributions made for 2021 .....	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions .....	_____	_____

## 2021 Deductions

<b>Medical and Dental Expenses</b>	<b>2021 Amount</b>	<b>2020 Amount</b>
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: _____		

<b>Taxes</b>	<b>2021 Amount</b>	<b>2020 Amount</b>
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 .....		

<b>Interest Expenses</b>	<b>2021 Amount</b>	<b>2020 Amount</b>
Home mortgage interest paid – Attach Form(s) 1098.		
<b>Lender's Name</b> _____		
Points paid on loan to buy, build or improve main home		
<b>Lender's Name</b> _____		

<b>Cash/Check/Credit Contributions</b>	<b>2021 Amount</b>	<b>2020 Amount</b>
_____		
_____		
_____		

**Noncash 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.

<b>Miscellaneous Deductions</b>	<b>2021 Amount</b>	<b>2020 Amount</b>
Union and professional dues .....		
Professional subscriptions, books, supplies .....		
Uniforms and protective clothing (including cleaning) .....		
Job search costs .....		
Taxpayer educator expenses.....		
Spouse educator expenses.....		
Tax return preparation fees .....		
Safe deposit box rental .....		
Gambling losses (to the extent of gambling income) .....		
Other expenses (list): _____		

paid at bottom

- 1 Did you receive an Economic Impact (Stimulus) Payment?  Yes  No  
If yes, how much did you receive?
- 2 Did you receive any Advanced Child Tax Credit payments?  Yes  No  
If yes, how much did you receive?
- 3 Did a lender cancel any of your debt in 2021? (Attach any Forms 1099-A or 1099-C)  Yes  No
- 4 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2021? If yes, please attach details.  Yes  No
- 5 Did you purchase a motor vehicle or boat during 2021?  Yes  No  
If yes, attach documentation showing sales tax paid.
- 6 Did you purchase a hybrid or electric vehicle in 2021? If yes, enter year, make, model, and date purchased:  Yes  No
- 7 Did you donate a vehicle in 2021? If yes, attach Form 1098C.  Yes  No
- 8 What was the sales tax rate in your locality in 2021?  % State ID
- 9 Did your marital status change during 2021?  Yes  No  
If yes, explain:
- 10 Were you or your spouse permanently and totally disabled in 2021?  Yes  No
- 11 Do you have dependents who must file?  Yes  No
- 12 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,200?  Yes  No
- 13 Did you provide over half the support for any other person during 2021?  Yes  No
- 14 Did you incur adoption expenses during 2021?  Yes  No
- 15 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?  Yes  No
- 16 Did you receive any disability payments in 2021?  Yes  No
- 17 Did you receive tip income not reported to your employer?  Yes  No
- 18 Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2021? If yes, attach closing or escrow statements, 1099-C or 1099-A forms.  Yes  No  
a  b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?  Yes  No
- 19 Did you incur any casualty or theft losses during 2021?  Yes  No
- 20 Did you incur any non-business bad debts?  Yes  No
- 21 Did you pay any individual for domestic services in 2021?  Yes  No
- 22 Did you take a retirement account distribution related to the corona virus or a natural disaster?  Yes  No
- 23 Did you buy or sell any stocks or bonds in 2021?  Yes  No
- 24 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?  Yes  No
- 25 Did you incur any moving expenses? If yes, attach details.  Yes  No
- 26 Did you receive any income not included in this Tax Organizer?  Yes  No  
If yes, please attach information.
- 27 Do you expect your income and deductions in 2022 to be the same as 2021?  Yes  No  
If no, attach explanation of changes expected.
- 28 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach.  Yes  No
- 29 At any time during 2020, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?  Yes  No
- 30 a Did you obtain a Paycheck Protection Program (PPP) loan?  Yes  No  
b If yes, has any portion of that loan been forgiven?  Yes  No
- 31 If you paid any alimony, enter recipient's SSN:  Alimony paid:
- 32 Enter your state of residence.  Taxpayer  Spouse
- 33a Do you want to change the language with which the IRS communicates with you?  Yes  No  
b If yes, which language?

Electronic Filing and Direct Deposit of Refund

- If your tax return is eligible for Electronic Filing, would you like to file electronically?  Yes  No
- The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.
- If you receive a refund, would you like direct deposit?  Yes  No
- If yes, please provide a voided check (not a deposit slip) if your bank account information has changed.
- What type of account is this?  Checking  Savings

Estimated Tax Paid

Federal			State			Local		
Date	Amount		Date	Amount	ID	Date	Amount	ID

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ADDITIONAL 2021  
TAX ORGANIZER INFORMATION**

Name(s) \_\_\_\_\_

**Please print clearly**

1. Did you or your spouse pay rent in 2021? If yes, what was total rent paid in 2021: \$ \_\_\_\_\_

2. Did you or your spouse pay for commuter rail tickets or EZ Pass tolls in 2021 for commuting to work in Massachusetts? Yes      No

If yes, how much did you pay:      Commuter rail: \$ \_\_\_\_\_ EZ Pass \$ \_\_\_\_\_  
How much did your spouse pay:      Commuter rail: \$ \_\_\_\_\_ EZ Pass \$ \_\_\_\_\_

3. Did you have health insurance coverage during 2021 while living in Massachusetts?

You: Yes \_\_\_ No \_\_\_      Your Spouse: Yes \_\_\_ No \_\_\_

If yes, did you/your spouse receive MA Form 1099HC or other proof of minimum credible coverage?  
If yes, provide copy of Form 1099HC.

Are you covered by Medicare?      Yes      No \_\_\_\_\_

Is your spouse covered by Medicare?      Yes      No \_\_\_\_\_

4. In 2021, did you or your spouse receive unemployment compensation? Yes \_\_\_ No \_\_\_

If yes, how much did you receive:      \$ \_\_\_\_\_; provide a copy of Form 1099-G

How much did your spouse receive:      \$ \_\_\_\_\_; provide a copy of Form 1099-G

**Initials:** \_\_\_\_\_

\_\_\_\_\_