Tax Year 2021 Organizer

SONRISE TagsAndTax LLC

Taxpayer Name & Primary Occupation: ______________________________

Spouse Name & Primary Occupation: ______________________________

*MILITARY PERSONNEL MUST PROVIDE ALL ORDERS/LES's FOR ALL ACTIVE DUTY TO AVOID TAX!!!

E-Mail Address : ______________________________

* ***Your Privacy*** is #1 !! We use your e-mail strictly to communicate tax information to you personally. We ***do not*** compile, rent, sell, or solicit!

Contact Phone #'s	
	Best Phone #: ____________ (Home / Work / Cell) ***Text ?*** Yes No
	Who? ____________ Best Time to Call/Text: ____________
	Secondary Phone #: ____________ (Home / Work / Cell) ***Text ?*** Yes No
	Who? ____________ Best Time to Call/Text: ____________

***Please indicate if we can text you at these numbers! It allows us to be more efficient in communicating with you!**

PLEASE make us aware of any changes such as your address, phone, e-mail, marital status or change in dependents!!!

Did you have an address change in 2021? ❐ No ❐ Yes - ***Please provide Settlement Sheets if you bought or sold!*** ☐

Address on 1/1/2021? ______________________________

Next Address ? ______________________________ Dates: ________thru________

Next Address ? ______________________________ Dates: ________thru________

❐ Yes ❐ No **2021 Filing Status change?** >>Date: __________ Married Separated Divorced Deceased ☐

*We may need/ask for proof (Marriage Cert, Divorce Decree, Death Cert etc) (***Please provide SS Card for any Name Change!***)

❐ Yes ❐ No **Change in Dependents?** ❐ Not Sure/Have Questions ☐

Add	Drop	First Name	M.I.	Last Name	D.O.B.	Sex	Social Security #		

*For any new dependents we MUST get copy of SS Card (*Possibly Birth Certificate*) *Drops-Note reason for not claiming!

Banking/Financial Questions & Direct Deposit/Debit Information ☐

❐ Yes ❐ No DID you have any financial interest in any virtual currency/cryptocurrency in 2021?*(Bitcoin, Litecoin, Ethereum, etc)*

❐ Yes ❐ No ❐ Unsure (Don't Understand) DO YOU have access to any out-of-country bank accounts?

❐ Yes ❐ No *Do you have Immediate Famliy/Close Relatives living in a Foreign Country?

❐ Yes ❐ No *Are you Power of Attorney for anyone living outside the US?

❐ Yes ❐ No DO you want to Direct Deposit your *TAX REFUND* ?

***We strongly recommend electronic payments if you owe tax instead of mailed checks/payments.**

❐ Yes ❐ No DO you want to Direct Debit/Withdrawal your TAX DUE if ***less than $50*** ?

❐ Yes ❐ No DO you want to Direct Debit/Withdrawal your TAX DUE if ***more than $50*** ?

❐ Yes ❐ No DO you want information on other Electronic Methods to pay your tax?

Bank Name: ______________________ Bank Routing #: ______________________

❐ See attached check Account #: ______________________ CHECKING or SAVINGS

Is the Account: Joint Taxpayer Spouse Verification Signature: ______________________

New "HOTSPOT" Items for 2021!

3rd "Stimulus" or Economic Impact Payment (EIP3) Information ☐

Please provide IRS Notice 6475 that will be mailed by IRS in Late January 2022 OR complete the details below!!!

Amount $$$: ____________________ When/Date: ________________ (March-April 2021) Check or Direct Deposit

This Money is ***NOT taxable, HOWEVER, we do NEED it to complete your 2021 income tax return!

❒ Yes ❒ No Did you get Advance Child Tax Credit Payments? *(July-Dec 2021)* ☐

❒ **Documentation / Ltr 6419 Attached** (***2 Ltrs for Married Filing Joint***) Amount(s) $ _________ # of Children _______

Date __________ **$**__________ **Date** __________ **$**__________ **Date** __________ **$**__________

Date __________ **$**__________ **Date** __________ **$**__________ **Date** __________ **$**__________

❒ Yes ❒ No Did you receive any Unemployment in 2021? *Please provide form(s) UC-1099G and/or PUA-1099G!!!* ☐

❒ Yes ❒ No Did you withdraw any retirement funds due to the Pandemic? *Please provide form(s) 1099-R!!!*

❒ Yes ❒ No Did you have "Obamacare" health insurance at anytime in 2021? ***You MUST PROVIDE ALL 1095-A's !!!***

Did you have an HSA (Health Savings Account) at anytime in 2021? *PLEASE SEE BELOW-you must provide form(s) 5498-SA & 1099-SA!!!* ☐

★Let us know if you made ***any*** charitable donations--up to ***$600 can be deducted*** *even if you don't go long form* **!!!** ☐

ITEMIZED DEDUCTIONS WORKSHEET

You can itemize your deductions on Schedule A ("going Long Form") if expenses exceed the standard deduction:

Single - $12,550, Married filing jointly - $25,100, Head of Household - $18,800

MEDICAL

****Expenses must exceed 7.5% of your adjusted gross income!!!* ☐

NOTES:

If you had health insurance coverage during any part of the year through the Gov't Marketplace/Healthcare.gov/Pennie/"Obamacare" YOU MUST PROVIDE *ALL 1095-A's*

HSA

❒ Yes ❒ No **Do you have an HSA (Health Savings Acct)?** ❒ *Self/Individual* ***or*** ❒ *Family*

How many months did you have a High Deductible Health Plan? ________

Did you make any HSA contributions outside of payroll? ❒ Yes-$ Amt _____________ ❒ No

Any HSA Distributions? ❒ Yes-was it ***ALL*** used for medical expenses? Y / N ❒ No

YOU MUST** provide ALL ***5498-SA for any contributions & ALL ***1099-SA*** for ***ANY*** distributions

Doctors, dentists, nurses, hospitals ……………………………………………….. _________

Prescription medicines, drugs & insulin ……………………………………………. _________

Health Insurance premiums (Post Tax Only-bring paystub if unsure) ………... _________

Miles traveled for medical care (plus parking, tolls, and fares)………………… _________

Long Term Care Insurance premiums - husband - __________ & wife - __________

Other: (hearing aids, dentures, eyeglasses, chiropractors, etc…) …………. _________

**Medical Expenses are deductible in the tax year PAID-regardless of when service was provided!*

**** For a detailed list of valid medical deductions check out "Medical Expense Deductions" on the "Resources" page of Sonrise.tax!***

TAXES

☐

NOTES:

Did you make any large purchases last year that you **did not** pay PA sales tax on? ❒ No ❒ Yes*

Online or Out-of-State Purchases (electronics, gifts, appliances, etc) *If yes list item and amount

Sales Tax Paid on large purchases, vehicles & boats……………………………. _________

Occupation Privilege Taxes, LST, etc. _________

School, county, & local real estate tax (Spring & Fall taxes) _________

Real Estate Taxes Escrowed? Y / N ❒ See Attached Mtg Docs/1098's etc.

SENIORS MUST BRING REAL ESTATE TAX BILLS STAMPED PAID TO APPLY FOR REBATE!!!

INTEREST PAID

☐ *See Attached Mtg Docs/1098's etc.* ☐

NOTES:

Home mortgages (banks and lenders - Form 1098) please bring documents… _________

Home equity loan (RVs, vacation homes, etc)……………………………… _________

Private Mortgage Insurance (**PMI**)-*(1098-Box 5)* …………………………… _________

Interest paid to maintain investments ……………………………………………. _________

***If you bought, sold or refinanced your home, please bring the settlement sheet(s)!**

CHARITABLE CONTRIBUTIONS ☐ See Attached List / Receipts ☐

NOTES:

★ If you made a ***Qualified Charitable Distribution*** (*QCD*) from your IRA-**Please let us know!!!**

Cash or check contributions(church, etc.-***must have bank records or receipts***) ________

(For a single gift of $250 or more you MUST have signed receipt *prior to filing*!)

**** If you DO NOT have proper records and receipts, IRS WILL DISALLOW them!!!***

Noncash (food, furniture, clothing, property to charitable organizations) ________

**(If "Noncash" exceeds $500, please include detailed list of charity, date, items & dollar value).

Travel for charity (Boy Scouts, Little League, church, etc..) # of miles ________

**For more detail check out the "Charity Deductions" guide on the "Resources" page of *Sonrise.tax*

EMPLOYEE/JOB EXPENSE DEDUCTIONS ☐

NOTES:

(IRS-NO LONGER DEDUCTIBLE : *PA-must exceed $1,000)

**** PA will ask for records, receipts, and letters from employers in MANY cases!***

Union Dues .... ________

Teacher/Educator Expenses *(Non-Reimbursed Classroom Supplies/Expenses)* ________

Professional Dues & Licenses (Realtor, LPN/RN, Barber/Beautician, Mechanic, etc.)... ________

Continuing Education (Must apply to current Job OR be required by employer or law).... ________

Liability/Malpractice Insurance OR Medical Exams Required by Employer.... ________

Work Uniforms/Nurse Whites *(required by employer & NOT suitable for ordinary wear!)* ________

**NO Jeans, T-shirts, socks, or general clothing unless logo'd/embroidered... ________

Laundering Uniforms above.. ________

Safety Equip,Tools & Supplies *(steel tips, gloves, glasses, hard hat, flashlights, etc.)* ________

EMPLOYEE TRAVEL EXPENSES- ***YOU MUST have Mileage/Expense LOGS with receipts!!!***

****If you had any temporary job travel, lodging and/or meal expenses-Please let us know!!!***

MISCELLANEOUS DEDUCTIONS ☐

Gambling Losses-***Only Deductible*** up to $$$ of Winnings Reported as Income! ____________

CASUALTY & THEFT LOSSES ** Generally must be greater than 10% of your income* ☐

*Generally the loss must occur in a Federally-declared disaster area (www.fema.gov/disasters)

Retirement Contributions ☐

Taxpayer: ❒ Traditional IRA $__________ ❒ ROTH IRA $__________ ❒ Payroll ONLY (401k, 403b etc)

Spouse: ❒ Traditional IRA $__________ ❒ ROTH IRA $__________ ❒ Payroll ONLY (401k, 403b etc)

❒ Other Retirement Plans/Contributions: ______________________________

Other Adjustments, Deductions & Credits

DAYCARE/CHILDCARE EXPENSES: ❒ **YES** ❒ **NO** ❒ **See attached Reciept** ☐

Need Name, Address, and ID#/Social Security # of Provider: ______________________________

List Name & $$$ Amount for *EACH* Child:	Child's Name:	$
	Child's Name:	$

COLLEGE / EDUCATION EXPENSES: ❒ **YES** ❒ **NO** ☐

❒ **Tuition:** MUST provide Form 1098-T* & Proof of Tuition PAID-***WE NEED*** a Financial Transcript from the institution!

❒ **Student Loan Interest:** Please Provide Form 1098-E* ______________________________

* Generally these forms go to the student & are increasingly only accessible online through a website or Student Account!!!

Any TAP 529 / Education Account Contributions or Distributions? ❒ **Yes** ❒ **No**

❒ **Contributions-**We must know how much and for who *(Name, Relation, SSN)* ______________________

❒ **Distributions-**We must have 1099-Q *& information on how it was spent/allocated to college expenses* ____________

Do You Need Data or a Worksheet for completing the FAFSA Application? ❒ **Yes** ❒ **No**

ADOPTION CREDIT/EXPENSES: ***Must provide Documentation of Decree, Expenses, SS Card & DOB!*** ☐

OTHER POSSIBLE DEDUCTIONS OR QUESTIONS:

Description	Amount	***QUESTIONS????***

What Do I Need For My Taxes?

One of the best ways to prepare and organize your "stuff" is to pull out last years tax return packet to refresh & review everything from last year. Next, gather all the documents you receive, including anything labeled *"Important Tax Information",* and review them for accuracy before bringing them to Sonrise. Then, visit *Sonrise.tax* and review our *"Meeting With Us"* & *"Resources"* pages for the most up to date information. Lastly, print & complete our *Tax Organizer* to make sure you don't miss anything! The best way to get a complete & accurate tax return filed by Sonrise in an efficient & timely manner is to provide your completed *Tax Organizer* & ALL your gathered documents, forms & materials in one visit!

IRS is still extremely backlogged & reeling from the pandemic so... *"IRS encourages everyone to have all necessary information in hand to make sure they file a complete and accurate return. Having an accurate tax return can avoid processing delays, refund delays and later IRS notices. IRS urges extra attention to those who received an Economic Impact Payment or an advance Child Tax Credit payment last year. Taxpayers should make sure they report the correct amount of these payments on their tax return to avoid delays."*

What Forms or Things Should I Bring ????

COMPLETED TAX ORGANIZER!!! SAVE $20 SEE>> SONRISE.TAX

ALL NEW CLIENTS MUST PROVIDE A COPY OF LAST YEARS TAX RETURN!!!
New Client??? We need to copy SS Cards for everyone on the tax return & Drivers License/ID for all ADULTS.

★ **You should receive IRS Letter 6419 if you got ANY advance Child Tax Credit Payments (AdvCTC)**
You should receive IRS Letter 6475 if you received the 3rd Economic Impact Payment (EIP3)
It is critical for you to give us *any or all of these letters* in order to prepare a correct & accurate tax return!!!

- Wage Documents: W-2 and 1099-MISC/1099-NEC forms
- Investment Income: 1099-INT, 1099-DIV & 1099-B forms
  - *Purchase Date & Price for Stocks Bought & Sold
- Unemployment Statement: UC-1099G & PUA-1099G
- Retirement, Pension, & Annuity Income: 1099-R forms
- Social Security Statement: 1099-SSA
- Gambling/Lottery/Prize Winnings & Losses: W-2G
- Foreclosure/Cancellation of Debt: 1099-A and/or 1099-C
- Estate or Partnership Income: Schedule K-1
- Business, Farm, & Rental Income Docs-see below
- 1099-K for Internet or Credit Card Sales
- Other Misc Inc. (Jury Duty, Hobby, etc): 1099-MISC/1099-NEC
- Blank/VOIDED Check (for Direct Deposit information)
- Health Insurance Doc's Including 1095-A, B, C
- HSA Policy (If you have one) 1099-SA / 5498-SA
- College tuition payment record & any *1098-T* forms
- Student Loan Interest and any 1098-E forms
- Educational or work-related expenses (See Organizer)
- Child care expense-Name, Address & ID# of Provider
- Alimony Income/Paid Record (*Need date of Divorce*)
- Settlement Sheets--Purchase or Refi of *ANY* Property
- Mortgage/Home Eq/LOC Interest (Form 1098)
- Real Estate Taxes (MUST be *stamped paid* for Rebate!)
- Charitable Contribution Summary
- Your Estimated Payment Records/Envelope for 2021
- Estimated Tax Vouchers - State & Local

ANY NEW DEPENDENTS???? Please provide Social Security card and Birth Certificate!

MILITARY PERSONNEL: MILITARY ORDERS ARE NEEDED FOR ALL ACTIVE DUTY!!!

Business Information Needed: (If you operate your own business)

#1-Total income received for sales and/or services **#2-Expenses subtotaled by category**
Health Insurance Premiums for Private/Self-Employed Plans (1095-A if on Pennie.com/"Obamacare")
List Overall Mileage & Business Mileage for any vehicles used for business
2021 Mileage Rate was 56.0 cents per mile *(2022 Mileage Rate will be 58.5 cents/mile)*
For large items (depreciable) we need cost, purchase date & description

****If you received any Covid Pandemic assistance (PPP, EIDL, Employee Retention Credit etc) please let us know!**

Notes for Independent Agents/Distributors of Larger Companies:

(ex: Mary Kay, Tastefully Simple, Jamberry, Pampered Chef, Avon, Thirty-One, Origami Owl, Paparazzi etc…..)

Your company's record keeping is usually complex and not designed for tax purposes-their definition of profit is different than the IRS's.

We recommend you give us the total of all money *YOU* received through your business (commissions & customer payments) and the expenses that you actually paid by cash, check, or credit card. Keep it simple!

Landlords, Farmers, Business Owners, & Day Care Providers

Please checkout the plethora of information on our website - Sonrise.tax/resources

It just may help you find those few extra deductions and answer some of those nagging questions.