2020

Tax Organizer

You may fill in your 2020 information or provide us this information through other means (QuickBooks, spreadsheets, handwritten lists, etc.). Also, please send us all tax forms you received (W-2, 1099's, etc.)

Please return no later than March 15th, 2021.

***** BE SURE TO SAVE THIS PDF TO YOUR DEVICE BEFORE COMPLETING*****

Baker Sullivan Hoover PLC

2020 Tax Questionnaire

Yes*	No	*If Yes to any questions, please provide us with any related tax forms and more details on the last page.
Personal Information		
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
Dependents		
☐	☐	Could you be claimed as a dependent on another person's tax return?
☐	☐	Were there any changes in dependents?
☐	☐	Did any of your dependents have unearned income over $1,100 or earned income over $12,400? If yes, the dependent is required to file a return.
☐	☐	Do you want us to prepare a tax return for your dependent if required?
☐	☐	Did you or your spouse pay for childcare while you or your spouse worked or looked for work?
CARES Act		
☐	☐	Did you or your spouse receive an economic impact payment? If so, please enter amount received ________.
☐	☐	Did you receive funds from the Paycheck Protection Program (PPP)? If so, please enter amount received ________.
☐	☐	Did you receive an Economic Injury Disaster Loan (EIDL)? If so, please enter amount received ________.
☐	☐	If you use the standard deduction, did you make at least $300 in cash donations in 2020 to qualified charities?
☐	☐	Did you receive a coronavirus-related distribution from a retirement plan? If so, include all **Forms 1099-R.**
Healthcare		
☐	☐	Did you obtain healthcare coverage through the Marketplace? If Yes, include all **Form 1095-A.**
☐	☐	Did you have any transactions pertaining to a health savings account (HSA) or medical savings account (MSA)? If so, include all **Forms 1099-SA and/or 5498-SA**.
Retirement		
☐	☐	Did you receive a distribution from or contribute to a retirement plan (401(k), IRA, etc.)? If so, include all **Forms 5498 and/or 1099-R**.
☐	☐	Did you transfer or rollover any amount from one retirement plan to another?
☐	☐	Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?
☐	☐	Did you withdraw any amounts from your IRA to pay for higher education expenses or acquire a principal residence? If so, provide us details.
Education		
☐	☐	Did you withdraw funds from a Coverdell Education Savings account or Qualified Education Program (Section 529) and use the funds for anything **other than** qualified education expenses? Please include **Form 1099-Q**.
☐	☐	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If so, include **Form 1098-T**.
☐	☐	Did you pay any student loan interest? If so, include **Form 1098-E**.
Investments		
☐	☐	Did you or your spouse sell any securities or investment property not reported on Form 1099-B?
☐	☐	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please include settlement statement you received at closing.
☐	☐	Did you or your spouse start, purchase, or sell a business, rental property, or farm, or acquire/sell any interest in any partnership or S corporation?

Yes* **No** *If Yes to any questions, please provide us with any related tax forms and more details on the last page.

☐ ☐ Did you or your spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?

Deductions and Credits

☐ ☐ Did you purchase any motor vehicles or boats in 2020? If so, provide sales tax paid.

☐ ☐ Did you make a qualified residential energy-efficient improvements or purchases involving solar, wind, geothermal, or fuel cell energy resources? If so, provide us with invoices you paid in 2020 along with the tax credit certificate received.

☐ ☐ Did you or your spouse contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization?

If yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of $10,000 or less.

Miscellaneous

☐ ☐ Did you receive any disability income? If so, provide us with any forms you received, 1099's, etc.

☐ ☐ Did you pay an excess of $1,000 in any quarter or $2,200 during the year for domestic services performed in or around your home to individuals who could be considered household employees?

☐ ☐ Did you have any interest in or a signature authority over a bank account, securities account, or other financial account in a foreign country?

☐ ☐ Was your home rented out for more than 14 days or used as a home office?

☐ ☐ Did you have total mortgages incurred on or before December 15, 2017 on your first and/or second residence greater than $1,000,000? Do you have total mortgages incurred after December 15, 2017 on your first and/or second residence greater than $750,000?

☐ ☐ Did you use funds from a Home Equity Line of Credit (HELOC) for anything **other than** to purchase, build, or substantially improve your residence?

☐ ☐ Did you make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value more than $15,000 to any individual?

☐ ☐ Do you expect any changes (income, deductions, dependents, etc.) to occur in 2021? If so, please provide details.

☐ ☐ Were you notified or audited by either the IRS or a State taxing agency? Please provide us details.

☐ ☐ May the IRS discuss your tax return with your preparer?

☐ ☐ A PDF Client Copy of your return and e-file release form (or Filing Copy) will be placed in your Client Axcess Portal for your retrieval. Would you like a paper copy of your completed tax return?

Tax Form Reference Guide

Please send us all tax forms you receive. Send us your original paper forms. Upload electronic forms to your Portal.

Income/Deduction	Tax Form
Wages	Form W-2
Interest and Dividends	Form 1099-INT and 1099-DIV
Sale of Stocks, Securities, Capital Assets	Form 1099-B
Miscellaneous Income	Form 1099-MISC and 1099-NEC
Retirement/Pension Distributions	Form 1099-R
Pass-thru Income (LLC's, S Corp., Partnership, Trust, Estate)	Schedule K-1
Unemployment Compensation	Form 1099-G
Social Security Income	Form SSA-1099
Mortgage Interest	Form 1098
Health Savings Account (HSA or MSA)	Forms 1099-SA and 5498-SA
Healthcare Coverage or Insurance	Forms 1095-A
Student Loan Interest	Form 1098-E
Tuition	Form 1098-T

Personal Information & Questions

Client:

First Name | Initial

Last Name

Social Security Number

Date of Birth

E-mail

Co-Client:

First Name | Initial

Last Name

Social Security Number

Date of Birth

E-mail

Address

City | State | Zip Code

Daytime Phone Number | Cell Phone Number

If we have questions regarding your tax information, how would you like us to contact you?

Did your marital status change during 2020? ◯ Yes ◯ No If yes, please explain.

Were you notified by the IRS or other taxing authority of any changes in prior year returns? ◯ Yes ◯ No

If you or your spouse has been a victim of identity theft and been contacted by the IRS, we must have the 6-digit identity protections PIN issued to you by the IRS to e-file your return.

PIN

I have submitted this information for the sole purpose of preparing my tax return(s). This information is true, correct, and complete to the best of my knowledge. I agree to the terms of the 2020 Tax Return Engagement Letter on file in my Client Portal if I 1) sign this tax questionnaire, 2) send 2020 tax data to prepare my 2020 tax return(s), or 3) authorize BSH to electronically submit my tax return to taxing authorities.

Client Signature | Co-Client Signature

Delivery Information

We will contact you once your return is completed and ready for you to review and sign. This year all tax returns eligible for electronic filing will be securely e-filed by our office. A PDF Client Copy of your return and e-file release form (or Filing Copy) will be placed in your BSH Document Vault (eVault) for your retrieval. If you would like a paper copy of your return, please check here. ☐

Please return my original tax documents by:

◯ USPS MAIL

◯ Other

If you would like us to send your original tax documents to an address OTHER than the address above, check here ☐ and provide the address below.

Dependent Information

Please complete the following information for all dependents. If no changes from last year, check here and skip to next question ☐

First Name & Initial	Last Name	SSN	Date of Birth	Relationship to Client	Months Lived at Home	Full-time Student at least 4 months
						☐
						☐
						☐
						☐

Do you have any children under age 18 with unearned income more than $1,100? If yes, please include all Forms 1099 the child received. ◯ Yes ◯ No

Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than $1,100? If yes, please include all Form 1099s the child received. ◯ Yes ◯ No

Did you adopt a child or begin adoption proceedings during 2020? If yes, please include additional information on page 20. ◯ Yes ◯ No

Bank Information

If you have an overpayment for 2020, would you like the amount applied to 2021? ◯ Yes ◯ No

Would you like your refund direct deposited into your bank account? ◯ Yes ◯ No

If you have a balance due, would you like to make the payment using a direct withdrawal? ◯ Yes ◯ No

If yes to either, include bank information below.

Owner of Account

Type of Account

Financial Institution

Routing Number

Account Number

Did you receive any interest or dividend income in 2020? ◯ Yes ◯ No

If yes, please complete this page and send us all Forms 1099-INT and 1099-DIV. If no, skip the rest of this page.

Did you close an account during 2020 that received interest/dividends in the prior year? If yes, please list the accounts that were closed. ◯ Yes ◯ No

Did you receive any interest or dividends in 2020 that was not reported on a 1099? ◯ Yes ◯ No

If yes, please provide the income information below.

Interest Income (Complete only if you did NOT receive a Form 1099-INT)

Name of Payer	Amount	Tax Exempt
		◯ Yes ◯ No
		◯ Yes ◯ No
		◯ Yes ◯ No

Dividend Income (Complete only if you did NOT receive a Form 1099-DIV)

Name of Payer	Total Dividends	Qualified Dividends	Capital Gain Distributions

Were you or your spouse a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account or other financial account in a foreign country? ◯ Yes ◯ No

If yes, was the combined value of your accounts greater than $10,000 at any time during 2020? ◯ Yes ◯ No

In what country is your bank account located?

Did you create or transfer money or property to a foreign trust? ◯ Yes ◯ No

Business Income & Expenses

Did you have any business income in 2020? ◯ Yes ◯ No If yes, provide us with all 1099-MISC

If yes, please complete this page. If no, skip the rest of this page.

Name of Business ______ Belongs to: ______

Please provide us with a QuickBooks file, Quicken, or Excel spreadsheet for each business.

Amount of Health insurance paid for you and your dependents ______

Did you purchase any new equipment, furniture, vehicles, etc. in 2020? ◯ Yes ◯ No
If yes, please provide a list of the assets purchased including a description, date purchased and purchase price.

Did you sell or dispose of any assets in 2020? ◯ Yes ◯ No
If yes, please provide a list of the assets sold/disposed including the date sold/disposed and any proceeds from the sale or reason for disposition.

Did the business make any payments in 2020 that would require it to file Form(s) 1099? ◯ Yes ◯ No
If yes, did the business file or will it file all required Form(s) 1099? ◯ Yes ◯ No

Did you have any automobile expenses related to this business? ◯ Yes ◯ No
If yes, see page 12.

Did you have a home office related to this business? ◯ Yes ◯ No
If yes, see page 13.

Please complete the income and expenses portion of this page ONLY if you do not provide us with a QuickBooks, Quicken, or Excel file of your 2020 business activity.

Business Income		Business Expenses (continued)	
Gross Sales & Receipts		Office Expenses	
Returns & Allowances		Pension & Profit Sharing Plans	
Other Income		Rent - personal property	
Cost of Goods Sold		Rent - real estate	
Beginning Inventory		Repairs & Maintenance	
Purchases		Supplies	
Cost of Labor		Taxes & Licenses	
Other Costs(Please List)		Travel	
Ending Inventory		Meals & Entertainment	
Business Expenses		Wages	
Advertising		Utilities	
Commissions & Fees			
Contract Labor			
Employee Benefits			
Insurance (other than health)			
Interest			
Legal & Professional Services			

Did you sell any stock, securities capital assets, or your home in 2020? ◯ Yes ◯ No

If yes, please complete this page and send us all Form 1099-B. If no, skip the rest of this page.

Sale of Stocks, Securities, Capital Assets

Please provide Form 1099-B and a realized gain/loss schedule for all sales, if possible.

If NO gain/loss schedule is available, please provide the details of the sale below.

Kind of Property & Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis

Did you sell any securities not reported on your Form 1099-B? ◯ Yes ◯ No
If yes, provide additional information above.

Did you sell, exchange, or purchase any real estate in 2020? ◯ Yes ◯ No
If so, please attach closing statements.

Did you receive grants of stock options from your employer, exercise any stock options granted to you or dispose of any stock acquired under a qualified employee stock purchase plan? ◯ Yes ◯ No

Did you engage in any put or call transactions? ◯ Yes ◯ No
If yes, please provide details.

Did you close any open short sales during 2020? ◯ Yes ◯ No

Did you or your spouse receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency? ◯ Yes ◯ No

Sale of Your Home

Did you sell your home in 2020? ◯ Yes ◯ No
If yes, please attach a copy of the closing statement and answer the following questions.

Did you own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale? ◯ Yes ◯ No

If your spouse is deceased, did the sale occur within two years of the date of death and did your spouse live in the home for at least 2 of the 5 years preceding the sale? ◯ Yes ◯ No

Did you ever rent out this property? ◯ Yes ◯ No

Did you ever use any portion of the home for business purposes? ◯ Yes ◯ No

Have you or your spouse sold a principal residence within the last two years? ◯ Yes ◯ No

At the time of the sale, the residence was owned by the: ________

Date Acquired	Date Sold	Selling Price	Original Cost	Cost of Improvements	Sales Expenses

Did you have any rental income in 2020? ◯ Yes ◯ No

If yes, please complete this page. If no, skip the rest of this page.

Please provide us with your QuickBooks, Quicken, or Excel spreadsheet for each rental property.

Did you purchase any new equipment, furniture, vehicles, etc. in 2020? ◯ Yes ◯ No
If yes, please provide a list of the assets purchased including a description, date purchased and purchase price.

Did you sell any assets in 2020? ◯ Yes ◯ No
If yes, please provide a list of the assets sold including the date sold and any proceeds from the sale.

Did you dispose of any assets in 2020? ◯ Yes ◯ No
If yes, please provide a list of the assets disposed including the date disposed and the reason for the disposition.

Did you have any automobile expenses related to these rental properties? ◯ Yes ◯ No
If yes, see page 12.

Did you have a home office related any of these rental properties? ◯ Yes ◯ No
If yes, see page 13.

Did the business make any payments in 2020 that would require it to file Form(s) 1099? ◯ Yes ◯ No
If yes, did the business file or will it file all required Form(s) 1099? ◯ Yes ◯ No

Please complete the income and expenses portion of this page ONLY if you do not provide us with a QuickBooks, Quicken, or Excel file of your 2020 rental activity.

	Property 1	Property 2	Property 3
Address			
Address (continued)			
Ownership % if not 100%			
How many days rented at FMV			
Number of days used personally			
Income			
Rents/Royalties Received			
Other Income			
Expenses			
Insurance			
Management Fees			
Interest Paid			
Repairs & Maintenance			
Supplies			
Taxes			
Utilities			

Did you receive any Schedules K-1 from a partnership, LLC, S corporation, trust or estate for 2020? ◯ Yes ◯ No

If yes, please complete this page. If no, skip the rest of this page.

Please attach all 2020 Schedules K-1 received.

List Schedules K-1 received	Is the entity involved in rental activity?	Are you actively involved in management decisions?	Hours worked in business in 2020
	◯ Yes ◯ No	◯ Yes ◯ No	
	◯ Yes ◯ No	◯ Yes ◯ No	
	◯ Yes ◯ No	◯ Yes ◯ No	
	◯ Yes ◯ No	◯ Yes ◯ No	
	◯ Yes ◯ No	◯ Yes ◯ No	
	◯ Yes ◯ No	◯ Yes ◯ No	
	◯ Yes ◯ No	◯ Yes ◯ No	
	◯ Yes ◯ No	◯ Yes ◯ No	
	◯ Yes ◯ No	◯ Yes ◯ No	
	◯ Yes ◯ No	◯ Yes ◯ No	

Did you have any automobile expenses related to any of these K-1's? ◯ Yes ◯ No If yes, see page 12.

Did you have a home office related to any of these K-1's? ◯ Yes ◯ No If yes, see page 13.

Did you have any farm income in 2020? ◯ Yes ◯ No

If yes, please complete this page. If no, skip the rest of this page.

Please provide us with your QuickBooks file, Quicken, or Excel spreadsheet for each farm.

Did you use gasoline or special fuels for farm purposes (other than for a highway vehicle) during the year? ◯ Yes ◯ No

Amount of Health insurance paid for you and your dependents

Did you purchase any new equipment, furniture, vehicles, etc. in 2020? ◯ Yes ◯ No
If yes, please provide a list of the assets purchased including a description, date purchased and purchase price.

Did you sell any assets in 2020? ◯ Yes ◯ No If yes, please provide details on page 18.

Did you dispose of any assets in 2020? ◯ Yes ◯ No If yes, please provide details on page 18.

Did you have any automobile expenses related to this farm? ◯ Yes ◯ No
If yes, see page 12.

Did you have a home office related to this farm? ◯ Yes ◯ No
If yes, see page 13.

Please complete the income and expenses portion of this page ONLY if you do not provide us with a QuickBooks, Quicken, or Excel file of your 2020 farm activity.

Income	Amount	Expenses (Continued)	Amount
Sale of livestock and other items bought for Resale		Labor hired	
Less Cost or Other Basis		Rent - Personal property	
Sale of Livestock, produce, grains, etc. you raised		Rent - Real estate	
Cooperative distributions (Forms 1099-PATR)		Repairs & maintenance	
Other Income		Seeds and plants purchased	
Expenses	Amount	Storage and warehousing	
Business meals & entertainment		Supplies purchased	
Chemicals		Taxes	
Custom hire (machine work)		Utilities	
Employee benefits		Veterinary, breeding, medicine	
Feed purchased		Other expenses	
Fertilizers and lime			
Freight & trucking			
Gasoline, fuel, oil			
Insurance (other than health)			
Interest			

Retirement Plan Information

Did you or your spouse turn age 72 during the year and have money in an IRA or other retirement account while **NOT** taking any distribution? ◯ Yes ◯ No

Did you withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence, pay medical or educational expenses? ◯ Yes ◯ No

if yes, please explain.

Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA? ◯ Yes ◯ No

if yes, please explain.

Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan? ◯ Yes ◯ No

if yes, please explain.

Distributions

Did you receive any distributions from a retirement account, pension or annuity in 2020? ◯ Yes ◯ No
If yes, please attach all Forms 1099-R received.

Did you rollover any IRA funds to another retirement account? ◯ Yes ◯ No
If yes, please indicate the amount on each 1099-R that was rolled over to another retirement account.

if yes, please explain.

Contributions

Did you or your spouse make any contributions to a retirement account in 2020? ◯ Yes ◯ No
If yes, please provide the contribution information below.

Type of Account	2020 Amount Client	2020 Amount Co-Client
Traditional IRA		
Roth IRA		

If you are self-employed, would you like to contribute the maximum amount to your self-employed retirement account?

SEP IRA ◯ Yes ◯ No

SIMPLE IRA ◯ Yes ◯ No

401(k) ◯ Yes ◯ No

Medical Savings Account (MSA) & Health Savings Account (HSA)

Please provide Forms 5498-SA and 1099-SA.

Did you or your spouse have any transactions pertaining to a medical savings account (MSA) during 2020? ◯ Yes ◯ No
If you received a distribution from an MSA, please include Form 1099-SA.

Did you or your spouse have any transactions pertaining to a health savings account (HSA) during 2020? ◯ Yes ◯ No
If you received a distribution from an HSA, please include Form 1099-SA.

Did you make any contributions to your HSA for 2020? ◯ Yes ◯ No

Contributions made for 2020 ____________

Did you have any distributions from your HSA in 2020? ◯ Yes ◯ No

Distributions received from HSA in 2020 ____________

Were all distributions from your HSA used for unreimbursed medical expenses? ◯ Yes ◯ No

Student Loan Interest

Did you pay any student loan interest in 2020? ◯ Yes ◯ No

Amount of Student Loan Interest paid in 2020 ____________

Other Income

Did you have any debts canceled, forgiven or refinanced during 2020? ◯ Yes ◯ No
If yes, please include Form 1099-C.

Did you or your spouse receive distributions from long-term care insurance contracts? ◯ Yes ◯ No
If yes, please include Form 1099-LTC.

Have you received a punitive damage award or an award for damages other than for physical injuries or illness? ◯ Yes ◯ No

Did you have any business related automobile expenses in 2020? ◯ Yes ◯ No

If yes, please complete this page. If no, skip the rest of this page.

Complete the following chart with your 2020 automobile expenses in the appropriate column(s).

Do you have written evidence to support your deduction? ◯ Yes ◯ No

Do you or your spouse have another vehicle available for your personal use? ◯ Yes ◯ No

Was your vehicle available for use during off-duty hours? ◯ Yes ◯ No

Name of Activity (i.e. business, rental, etc.)			
Description of Vehicle			
Date Placed in Service			
Total Mileage			
Business Mileage			
Commuting Mileage			
Interest			

Stop here if you are using the standard mileage rate.

Complete the following if you use the actual expense method

Purchase Price of Car			
Lease Payments			
Parking Fees & Tolls			
Fuel & Oil, Repairs, Insurance etc.			
Licenses, Taxes			

Home Office Expenses

Did you have a home office in 2020? ◯ Yes ◯ No

*Do not complete if you are a W-2 employee as these expenses are nondeductible to employees.

If yes, please complete this page. If no, skip the rest of this page.

Complete the following chart with your 2020 home office expenses in the appropriate column(s).

Name of Activity (i.e. business, rental, etc.)			
Square Footage of home used regularly and exclusively for business			
Total Square Footage of Home			

Indirect Expenses: Indirect expenses are required for keeping up and running your entire home.

Deductible Mortgage Interest			
Real Estate Taxes			
Insurance			
Repairs & Maintenance			
Utilities			
Rent			
Condo / Association Dues			

Direct Expenses: Direct expenses benefit the business part of your home.
Example: Purchase new carpet for room used for home office.

Please complete this page if you would like to itemize your deductions.

Medical & Dental Expenses

To be deducted, medical expenses must exceed 7.5% of your adjusted gross income.

	2020 Amount
Prescriptions	
Doctors, Dentists	
Hospitals, Clinics, etc.	
Other	
Medical Miles	0

@ $0.17 = $0.00

Taxes

	2020 Amount
Real Estate Taxes (not included on Form 1098): County Taxes	
Real Estate Taxes (not included on Form 1098): City Taxes	
Personal Property Taxes Paid	

Sales Tax

Did you make any large purchases, such as motor vehicles and boats? ◯ Yes ◯ No

If yes, how much sales tax was paid on the purchase?

General sales tax paid on specified items

Do you prefer to use actual sales tax paid or the sales tax table?

If actual sales tax, please provide us with the actual sales tax paid during 2020.
(You should retain all receipts)

Mortgage Interest (Provide all Forms 1098)

Property Secured i.e. 123 Main St.	Interest Paid	Received 1098	Principal Balance Beginning	Principal Balance Ending	Interest Rate
		Yes No			
		Yes No			
		Yes No			
		Yes No			
		Yes No			
		Yes No			
		Yes No			

Provide the following information for Interest paid where no 1098 was received.

Payee's Name		Payee's Name	
Address		Address	
SSN		SSN	

Did you buy, sell or refinance a new home in 2020? Yes No

If yes, please enclose the closings statement.

If you refinanced, how many years is your new mortgage loan?

Investment Interest Expense

	2020 Amount	Describe Investment
Investment Related (i.e. vacant land, etc.)		
Brokerage Margin account		
Other		

If you use the standard deduction, did you make at least $300 in cash donations in 2020 to qualified charities? ◯ Yes ◯ No

Charitable Contributions - Cash (i.e. Cash, Check, Debit, Credit Card)

Charitable Organization	2020 Amount	Charitable Organization	2020 Amount

Charitable Contributions - Non Cash

Charitable Miles ____ @ $0.14 = $0.00

Did you contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization? ◯ Yes ◯ No

If yes, please attach appraisal documents and additional information.

Organization	Description of Donated Property	Date Acquired	Date Donated	Cost Basis	Fair Market Value

Casualty/Theft Losses

Did you incur any casualty or loss attributable to a federally declared disaster? ◯ Yes ◯ No

If so, please include documentation from insurance claim.

Description of Casualty Loss	Date of Casualty	Insurance Reimbursement	Original Cost	Date Acquired	Value Before Casualty	Value After Casualty	Cost of Replacement

The expenses below are not deductible on the Federal return but may be deductible on some state returns.

Miscellaneous Itemized Deductions

	2020 Amount
Union and Professional Dues	
Tax Preparation Fee	
Professional Subscriptions	

	2020 Amount
Safe Deposit Box	
Uniforms and Protective Clothing	
Work Tools	

Unreimbursed Employee Expenses

Do NOT include expenses that your employer reimbursed to you.
Do include expenses if they were reimbursed and included in your W-2 wages.

	2020 Amount
Parking Fees & Tolls	
Meals & Entertainment	

	2020 Amount
Travel	

Estimated Tax Payments

		Federal		State / Local	
	Due Date	Date Paid	Amount Paid	Date Paid	Amount Paid
Applied from Prior Year					
1st Quarter	7/15/2020				
2nd Quarter	7/15/2020				
3rd Quarter	9/15/2020				
4th Quarter	1/15/2021				

Child/Dependent Care Expenses

Did you pay for child care while you worked or looked for work? ◯ Yes ◯ No
If yes, please complete the following.

For children under 13 or individual who is physically or mentally incapable of self care.

	Provider 1	Provider 2	Provider 3
Name of Provider			
Address			
SSN or EIN			
Child/Dependent that received care			
Expenses incurred and paid in 2020			
Expenses incurred and not paid in 2020			

Tuition Credit/Deductions

Did you or your dependents incur any post-secondary education expenses, such as tuition? ◯ Yes ◯ No
If yes, please attach all Forms 1098-T.

Did you withdraw amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529 plan)? If yes, include Form 1099-Q. ◯ Yes ◯ No

Household Employees

Did you pay in excess of $1,000 in any quarter or $2,100 during the year for domestic services performed in or around your home to individuals who could be considered household employees? If yes, provide additional information on page 18. ◯ Yes ◯ No

Energy Credit

Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells? If yes, provide detail below. ◯ Yes ◯ No

Description of Purchase	Cost of Improvement	Date Installed

Gifts You Made to Others (including Trusts)

If you or your spouse made gifts to an individual in 2020 in excess of $15,000, please complete this form. If gifts were not made or do not exceed $15,000, skip this page.

Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, etc., with a total (aggregate) value in excess of $15,000 to any individual during the year? ◯ Yes ◯ No

Did you or your spouse make any gifts to a trust for any amount during the year? ◯ Yes ◯ No

Do you or your spouse have a life insurance trust? ◯ Yes ◯ No

Did you assist in the purchase of any asset (auto, home) for any individual during the year? ◯ Yes ◯ No

Did you forgive any indebtedness to any individual, trust or entity during the year? ◯ Yes ◯ No

Please complete the following regarding your 2020 gifts. Please indicate if the gift was made by the client, co-client, or jointly.

	Gift 1	Gift 2	Gift 3
Name of Person Receiving Gift			
Address of Person			
Your Relationship to the Person			
Age of the Person			
Date of Gift(s)			
Description of Gift			
Amount of Gift			
Cost Basis of Assets Gifted if Other Than Cash			
Value of Assets Gifted if Other Than Cash			

Additional Information

Please provide additional information not requested elsewhere.

- ☐ Provide us your tax documents and forms (W-2, 1099, 1098, 1095, etc.). You do NOT need to enter any information from a tax document or form on our Tax Organizer.
- ☐ Avoid duplicating information. Provide us your tax information in any organized format you choose but avoid duplicating information as it often causes us to spend more time.
- ☐ Provide us closing statements (HUD-1) for all real estate purchases and/or sales that occurred in 2020.
- ☐ Provide us legal documents (new wills, trusts, etc.) that would be beneficial to us for planning purposes.
- ☐ Tell us what has changed or is about to change in your financial life.
- ☐ Tell us what is missing (i.e., Schedule K-1's) and when you expect to send it to us.
- ☐ Share with us any new advisors (bankers, brokers) and their contact information in case we need to reach them for tax purposes.
- ☐ Let us know if you would like a paper copy of your return. An electronic copy (PDF) will be provided to you via our Client Portal.
- ☐ Specify how you would like your tax information returned to you (pickup, mail, etc.).
- ☐ Tell us how you would prefer that we communicate with you (cell phone, e-mail, etc.).
- ☐ Advise us if your travel schedule will require special considerations for pickup or delivery of your return(s).
- ☐ Make an appointment if your information is unusual, not well organized, or if you have questions you would like to discuss with us before preparing your return.
- ☐ Submit all your tax information to us by **March 15th**.
- ☐ If you are running behind or would like more time to compile your tax information, let us know as soon as possible and we will file for an extension.
- ☐ Provide any information regarding 2020 gifts (including trust documents and EIN's) so that we may determine what gift tax returns are required. Also, if you set up any Grantor-Type trusts for 2020, please provide all information relating to the formation and assets transferred.
- ☐ Provide details of all estimated tax payments - both Federal and State

Email Form

Baker Sullivan Hoover PLC

Save Form