

Howland Tax Services International



2020 Personal Tax Organizer (United States)

Personal Information

You	Your Spouse
Name (include initial)	Name (include initial)
SSN or ITIN	SSN or ITIN
Date of Birth	Date of Birth
Preferred Filing Status: <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Jointly	<input type="checkbox"/> Head of Household (with Qualifying Person) <input type="checkbox"/> Married Filing Separately <input type="checkbox"/> Qualifying Widow(er) with Dependent Child
Address	Address (if different)
Zip Code	Zip Code
Phone	Phone
Email	Email
Occupation	Occupation
Filing Category (You): <input type="checkbox"/> United States Citizen <input type="checkbox"/> Green Card Holder <input type="checkbox"/> Resident Alien <input type="checkbox"/> Non-Resident Alien <input type="checkbox"/> Live in Canada, Work in U.S. (Commuter)	Filing Category (Your Spouse): <input type="checkbox"/> United States Citizen <input type="checkbox"/> Green Card Holder <input type="checkbox"/> Resident Alien <input type="checkbox"/> Non-Resident Alien <input type="checkbox"/> Live in Canada, Work in U.S. (Commuter)

United States Visa type and date issued (if applicable): _____

Canadian Visa type and date issued (if applicable): _____

Non-Resident Aliens – days present in U.S. during... 2020: _____ 2019: _____ 2018: _____

Your Dependants	1	2	3
Name			
Date of Birth			
Relationship			
SSN or ITIN			
Income (Type and Amount)			
Months Lived With You			
U.S. Citizen/Resident Alien?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

General Background

Did your marital status change during the year? Yes No

If yes, indicate change and date of change: _____

Did you live apart from your spouse for the entire year? Yes No

Does your spouse itemize deductions on a separate return? Yes No

Do you want \$3 to go into the Presidential Election Campaign Fund? Yes No

Were you or your spouse enrolled as a full-time student during 2020? Yes No

Did you pay any educational tuition or fees for yourself or a dependent? Yes No

Were you or your spouse permanently disabled at any time during 2020? Yes No

Were you or your spouse legally blind at any time during 2020? Yes No

Did you pay childcare expenses? Yes No

If yes, provide names, addresses and tax ID numbers (SSN or EIN) of childcare providers, and receipts.

Did you engage in a transaction involving virtual currency during 2020? Yes No

Do you want to show your email address on your Form 1040 or Form 1040-SR return filed with the IRS? Yes No

Health Insurance

Did you purchase health insurance through a government-sponsored Marketplace in 2020? Yes No

Please provide copies of Form 1095-A, 1095-B, or 1095-C if received.

New for 2020

Economic Impact Payments

Did you receive any Economic Impact Payments (EIP 1, EIP 2)? Most eligible taxpayers have received their first Economic Impact Payment. Payments of the second Economic Impact Payment started during the last week of December, with more payments occurring in early 2021.

Economic Impact Payments are not taxable on your U.S. return, but we need to know how much you received to determine if you are eligible to claim a Recovery Rebate Credit. This information can be obtained online if you have an account at www.irs.gov, or by referring to the IRS letters you received with your payments.

Please indicate how much you received for:

Economic Impact Payment 1 (EIP 1):

Economic Impact Payment 2 (EIP 2):

Educator Expenses related to COVID-19

If you were an eligible educator, did you pay or incur educator expenses after March 12, 2020 for personal protective equipment, disinfectant, and other supplies used for the prevention of the spread of coronavirus?

Yes No

Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals

If you were an eligible self-employed individual (you regularly carried on a trade or business within the meaning of section 1402 of the Internal Revenue Code), and you were unable to work in 2020 for reasons related to COVID-19, you may be able to claim this credit by filing Form 7202 with your Form 1040 or 1040-SR return.

Request for Change in Language Preference

Schedule LEP is a new form that allows taxpayers to state a preference to receive written communications from the IRS in a language other than English. If you wish to file this form please let us know.

Documents needed to prepare your return(s)

- New clients: complete copies of the last tax returns filed
- Copies of income tax forms received, including W-2, 1042-S, 1095-A, 1095-B, 1095-C, 1098, 1098-C, 1098-T, 1099-B, 1099-C, 1099-DIV, 1099-G, 1099-INT, 1099-K, 1099-MISC, 1099-OID, 1099-Q, 1099-QA, 1099-R, 1099-SA, RRB-1099-R, SSA-1099, SSA-1042-S, Schedule K-1, etc.
- Indicate income from alimony, gambling winnings, prizes or awards, scholarships or fellowships, jury duty, etc.
- Eligible educators: qualified expenses paid (e.g. classroom materials, professional development courses)
- Homeowners: statements showing mortgage interest and qualified mortgage insurance payments (e.g. Form 1098), sale of home or other property (e.g. Form 1099-S), real estate taxes paid
- Receipts for rent paid, if your state return permits a rental tax credit and you qualify
- Receipts for moving expenses, if you are a member of the Armed Forces on active duty, and due to a military order you move because of a permanent change of station
- Documentation of cash gifts, if you gave more than \$15,000 to any one person during the year
- Receipts for student loan interest paid
- Documentation of qualified educational expenses (e.g. Form 1098-T)
- Receipts for auto personal property tax paid
- Charitable donations: provide bank record, cancelled check or receipt for all amounts
- Investment interest expense receipts
- Childcare expense receipts
- Alimony paid: provide documentation
- Receipts for medical/dental expenses and reimbursements from health coverage plans
- Casualty/theft losses: provide documentation
- Estimated tax payments made for 2020: provide documentation
- IRS or State correspondence and assessment notices, if received
- Receipts for IRA, Keogh, and other retirement plan contributions
- Income and expenses from rental properties or businesses
- Foreign Tax Credit: if you paid tax to a foreign country for income earned outside the United States, provide details and a copy of the foreign tax return
- Please indicate any other income or expense amounts:

Refunds

If you receive a refund on your 2020 income tax return, do you want to apply that refund to your 2020 tax?

Yes No

Do you want your refund to be direct deposited into your bank accounts?

Yes No

If yes, provide information for up to three accounts (banks must be located in the U.S.):

Bank Routings: _____

Account Numbers: _____

Do you want to use a portion of your refund to buy Series I U.S. Savings Bonds?

Yes No

If yes, please indicate preferred amount invested in bonds (must be divisible by 50), and indicate bank routing and account number for deposit of remaining refund:

Foreign Accounts and Investments

Did you have more than \$10,000 in foreign (non-U.S.) bank or financial accounts at any time during 2020

(including Canadian RRSPs, RRIFs, RESPs, or TFSA's)?

Yes No

If yes, FinCEN Report 114 *Report of Foreign Bank and Financial Accounts* should be filed by April 15 using the BSA E-Filing system. If you would like us to complete and file the form for you, please provide name and addresses of financial institutions, account numbers and types, and maximum values of each account during 2020:

If you had foreign (non-U.S.) financial assets in 2020, you may also be required to file Form 8938 *Statement of Specified Foreign Financial Assets* or Form 8621 *Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund* with your income tax return(s).