



MEMO SHEET

THINGS TO REMEMBER FOR 2020 TAX PREPARATION:

- **ENGAGEMENT LETTER** (enclosed)
 - o Sign and date and return with your tax info (If you have **renewed** your Driver's License within the last year please provide the new issue date and the new expiration date. Or, indicate when signing the letter that Driver's License and bank account information given for 2019 has not changed)
- **DEADLINE**
 - o Submit tax information by **March 20, 2021** (anything received after that date may have to be put on extension)
- **UPLOADING**
 - o If you would like to upload your documents please call us to provide a link for you thru ShareFile which will allow you to upload your documents securely
 - o When uploading docs please make sure they are in PDF format. If you are taking pictures of docs from your phone please use the free App "Adobe Scan" to convert to PDF format
- **TAX ORGANIZER**
 - o For those clients who have received tax organizers in the past one will automatically be mailed to you by 01/15/2020
 - o For those who wish to sign up to receive an organizer please call us or visit our website at WWW.INDIANOCPA.COM

Please call us with any questions or concerns at 440-526-0126
or email us at INFO@INDIANOCPA.COM

2020 TAX ORGANIZER

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

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 2020 qualified student loan interest

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

Employer Name

2019 Amount

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, 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 B premiums withheld

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

1099-DIV Payer Name

2019 Amount

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 2020

Roth IRA contributions made for 2020

SEP, Keogh, Individual 401(k) or SIMPLE Contributions

2020 Deductions

Medical and Dental Expenses	2020 Amount	2019 Amount
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:		

Taxes	2020 Amount	2019 Amount
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		

Interest Expenses	2020 Amount	2019 Amount
Home mortgage interest paid – Attach Form(s) 1098.		
Lender's Name		
Points paid on loan to buy, build or improve main home		
Lender's Name		

Cash/Check/Credit Contributions	2020 Amount	2019 Amount

Noncash Charitable Contributions	2020 Amount	2019 Amount
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.		

Miscellaneous Deductions	2020 Amount	2019 Amount
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):		

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

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.		
If you receive a refund, would you like direct deposit?	☐	☐
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.)
