McAuley & Crandall, PA
CERTIFIED PUBLIC ACCOUNTANTS

Dear :

The 2021 Tax Organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2021 income tax return. Please complete the organizer sections as appropriate and provide supporting documentation where necessary. Prior year data is included on the organizer sections for your reference and to help assist you gather the required info needed for this year. Also included with the Tax Organizer is a checklist containing a list of common forms and documents provided to report tax related transactions and events that have been reported to the taxing agencies. Please review the **checklist on the back** and provide any documents you received. If you believe you should have received a tax document for any of the items on the checklist and you did not, you need to contact the person or organization responsible.

Due to the high volume of tax returns prepared by our firm, your completed tax organizer and substantially all of your tax information needed to complete the tax returns MUST be received before April 1, 2022 so that the returns may be completed by the original filing due dates. Any information received after that date will require that an extension be filed for this return; we will charge an additional fee of $75. Any tax that you may owe with your returns must also be paid with that extension. Any taxes not paid by the filing deadline are subject to IRS late penalties and interest when those taxes are actually paid. The law provides various penalties that may be imposed when taxpayers understate their tax liability. You, as the taxpayer, remain responsible for the payment of all tax, penalties, and interest charges imposed by tax authorities. We will do our best to estimate your liability but an exact figure will not be ready until the return is complete. If we do not hear from you or receive any of your information, it is your responsibility to request that we file an extension on your behalf.

Thank you for your help in the completion of the tax organizer and questionnaire. This will help keep your tax preparation cost from significantly increasing by ensuring we have all required information at the start of preparation. To try to prevent any potential Identity Theft, **we would like clients to use the Intuit Link** or to password protect any documents sent to us. If you have used Intuit Link before, you are still able to securely load your documents on your existing account; you will not have to be invited again. Please contact our office manager to request an invitation if you are not already registered.

We will not make any pre-scheduled appointments for this upcoming tax season. Please contact our office manager to schedule an in-person appointment. 913-239-9130 or officemanager@mccpas.com.

Otherwise you will be able to drop off, mail, fax, or email in your tax information. You can also safely upload your documents to intuit link where you can complete our questionnaire and sign the engagement letter. We will reach out with any questions or additional information needed once we have begun to prepare your returns. **Becky's appointments**: Please respectfully wear a mask the entire time you are in her office per her request.

If you have any questions or concerns, please contact our office manager at 913-239-9130 or officemanager@mccpas.com.

Sincerely,

MCAULEY & CRANDALL, PA

Document Checklist

Documents can be securely uploaded to Intuit Link - contact our office to receive the invite if you have not used before

- W-2 (wages)
- 1099-R (retirement)
- 1099-INT (interest)
- 1099-DIV (dividends)
- 1099-MISC (Misc income/Non-Employee compensation)
- 1099-B (brokerage sales, **including cost basis information for investments sold**)
- 1099-G Unemployment
- Annual brokerage statements (that may include 1099-INT, 1099-DIV & 1099-B)
- Schedule K-1 (Forms 1065, 1120S, 1041)
- Form 1098 (mortgage interest)
- Real estate tax receipt, may be shown on mortgage interest statement if paid by escrow
- Form 1095-A (health coverage) **marketplace insurance only**
- Closing statements pertaining to real estate transactions, including personal residence, purchase or sale (HUD-1/closing statement) and 1099-S if received
- Form 1099-K (Merchant Card and Third Party Network Payments)
- Any tax notices received from the IRS or other taxing authorities
- Child credit advance payment letter from the IRS
- Vehicle/personal property tax receipts (KS: tag renewal/purchase MO: year-end)
- Non cash donation receipts with itemized list of property donated and estimated value
- A voided check for direct deposit/withdrawal
- Any other 1099 or 1098 forms received
- Driver's License for Taxpayer & Spouse when applicable for some states - not needed for KS or MO only returns
- List of foreign bank accounts including address of institution and maximum account balance during year (if aggregate value of accounts exceed $10,000 during year)
- Copy of prior year return if new client

Client:

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. To confirm an understanding of our mutual responsibilities, the engagement between you and our firm will be governed by the following terms of this agreement.

We will prepare your 2021 federal and requested state income tax returns from information that you provide to us. We will not audit or otherwise verify the data you submit, although it may be necessary to contact you to clarify some information. We will provide you with an organizer to guide you in gathering the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked and help keep your cost from significantly increasing.It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. **You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.**

Our work in connection with the preparation of your income tax return does not include any procedures designed to discover defalcations or other irregularities, should any exist. However, should we find any irregularities or unusual items we will bring them to your attention. If we discover any errors or omissions on a prior year return we will bring that to your attention.

We bill extra for work that is not a tax preparation process, such as calculating a stock's basis, helping a client determine the basis of an asset that is sold especially a vacation home or rental property, reviewing a divorce or separation agreement and determining taxable alimony or dependent entitlement or any accounting or bookkeeping assistance as determined to be necessary for preparation of the income tax return. Our engagement also does not include tax planning services. **Additional charges will apply for such services.** During preparation of your return we may bring to your attention potential tax savings strategies for you to consider as a possible means of reducing your taxes in subsequent tax years. However, we have no responsibility to do so, and will take no action with respect to such recommendations, as the responsibility for implementation remains with you, the taxpayer.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities, interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible. Pursuant to requirements relating to practice before the Internal Revenue Service, we are required to advise you that any tax advice is not intended to be used, and cannot be used, for purposes of (i) avoiding penalties imposed under the United States Internal Revenue Code or (ii) promoting, marketing or recommending to another person any tax-related matter.

Due to the high volume of tax returns prepared by our firm, your completed tax organizer and substantially all of your tax information needed to complete the tax returns MUST be received before April 1, 2022 so that the returns may be completed by the original filing due dates. Any information received after that date will require that an extension be filed for this return; we will charge an additional fee and send invoice. Any tax that you may owe with your returns must also be paid with that extension. Any taxes not paid by the filing deadline are subject to IRS late penalties and interest when those taxes are actually paid. The law provides various penalties that may be imposed when taxpayers understate their tax liability. You, as the taxpayer, remain responsible for the payment of all tax, penalties, and interest charges imposed by tax authorities. We will do our best to estimate your liability but until the return is complete, an exact figure will not be ready. If we do not hear from you or receive any of your information, it is your responsibility to request that we file an extension on your behalf.

Certain individuals may be required to electronically file Form 114, Report of Foreign Bank and Financial Accounts (FBAR) with the U.S. Department of the Treasury. Failure to comply with the filing requirements may result in significant civil and criminal penalties. Unless otherwise specifically agreed in writing, we will not prepare, file, or provide assistance with this form.

This engagement does not include responding to inquiries by any governmental agency or tax authority. Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination or correspondence, we will be available upon request to represent you and will render additional invoices for the time and expense incurred. **There will be no charge if you have purchased the audit protection plan for your return.**

A service charge of 10% per month will be charged on all invoices not paid within thirty days from the date of the invoice. Your signature indicates that you agree to pay all reasonable fees and collection costs incurred by the firm. The engagement does not include any services not specifically identified above. We may need to perform additional accounting, calculation or research services incidental to the preparation of your tax returns. These incidental services will be billed with your tax return at our standard rates. Our rates and fees are based upon the complexity of the work to be performed, and our professional time, as well as out-of-pocket expenses. In addition, our rates and fees depend upon the timely delivery, availability, quality, and completeness of the information you provide to us. You agree that you will deliver all records requested and respond to all inquiries made by our staff to complete this engagement on a timely basis. **You agree to pay all fees and expenses incurred whether or not we prepare the income tax returns.**

PLEASE NOTE: YOUR RETURN CAN NOT BE ELECTRONICALLY TRANSMITTED UNTIL WE RECEIVE YOUR E-FILE FORM ALONG WITH PAYMENT FOR OUR SERVICES. In the event of divorce/separation but a joint return is being filed; our fee must be paid before e-filing will be completed. We will not contact the other spouse regarding receiving payment.

Our policy is to dispose of our copies of tax returns, work papers, and other tax information that is more than six years old. Your responsibility for retention of your own tax records varies, depending upon the type of tax return or other information involved. Taxpayers are required to maintain all the documents that form the basis of income, deductions, credits and payments shown on the return. In addition, some items have specific substantiation requirements set forth by the IRS (e.g. auto, meals & entertainment, and charitable contributions over $250, etc.)

This letter comprises the complete and exclusive statement of the agreement between parties, superseding all proposals, oral and written and all other communications between the parties. The terms and conditions of the engagement shall be governed and constructed in accordance with the laws of the state of Kansas and may only be modified in writing signed by all parties. If the above fairly sets forth your understanding of the engagement, please sign the enclosed copy of this letter and return it to our office along with your completed tax organizer.
We want to express our appreciation for this opportunity to work with you.

Very truly yours,

McAuley & Crandall, PA

____________________________ __________ ______________________________ __________

Signature of Client Date Signature of Spouse (if present) Date

_____________________________ _______________________________

Printed Client Name Printed Spouse Name (if present)

2021	1040	US	Tax Organizer

MCAULEY & CRANDALL
7200 W 132ND ST STE 160
OVERLAND PARK KS 66213
Telephone number: **(913) 239-9130**
Fax number: **913.239.0520**
E-mail address: **info@mccpas.com**

Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2021 tax return. Please enter all pertinent 2021 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

CLIENT INFORMATION

	Taxpayer	Spouse
First name and initial		
Last name		
Title/suffix		
Social security number		
Occupation		
Date of birth (m/d/y)		
Date of death (m/d/y)		
1=blind		
Home phone		
Work phone		
Work extension		
Cell phone		
E-mail address		

Address	In care of	
	Street address	
	Apartment number	
	City	
	State	
	ZIP code	

DEPENDENTS

	Dependent No.	Dependent No.
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

	Dependent No.	Dependent No.
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

2021	1040	US	Tax Organizer

Please enter all pertinent 2021 information. If you have attached a government form for an item, check the box and do not enter a 2021 amount.

WAGES, SALARIES AND TIPS

Employer name:	2021 Amount	2020 Amount
☐	Attach Forms W-2	
☐		
☐		
☐		
☐		

INTEREST INCOME

Payer name:	2021 Amount	2020 Amount
☐	Attach Forms 1099-INT	
☐		
☐		
☐		
☐		

DIVIDEND INCOME

Payer name:	2021 Amount	2020 Amount
☐	Attach Forms 1099-DIV	
☐		
☐		
☐		
☐		

PENSIONS, IRA AND GAMBLING INCOME

Payer name:	2021 Amount	2020 Amount
☐	Attach Forms 1099-R & W-2G	
☐		
☐		
☐		
☐		
Winnings not reported on W-2G		
Total gambling losses		

OTHER GOVERNMENT FORMS - INCOME

	2021 Amount	2020 Amount
☐ Form 1099-B - Sales of stock (also include transaction history)	Attach Forms 1099	
☐ Form 1099-MISC - Miscellaneous income		
☐ Form 1099-K - Merchant card and third party network payments		
☐ Form 1099-S - Sales of real estate (also include closing statements)		
☐ Form 1099-G - State tax refunds	Attach Forms 1099	
Taxpayer:		
☐ Form SSA-1099 - Social security benefits	Attach Forms 1099	
☐ Form 1099-G - Unemployment compensation		
☐ Form 1099-Q (529 Plan)		
☐ Form 1099-QA/5498-QA (ABLE Accounts)		
Spouse:		
☐ Form SSA-1099 - Social security benefits	Attach Forms 1099	
☐ Form 1099-G - Unemployment compensation		
☐ Form 1099-Q (529 Plan)		
☐ Form 1099-QA/5498-QA (ABLE Accounts)		

2021	1040	US	Tax Organizer

MISCELLANEOUS INCOME

Taxpayer: Alimony received		
Spouse: Alimony received		
Other:		

RETIREMENT PLAN CONTRIBUTIONS

	2021 Amount	2020 Amount
Taxpayer: Traditional IRA contributions (1=maximum)		
Roth IRA contributions (1=maximum)		
Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)		
Spouse: Traditional IRA contributions (1=maximum)		
Roth IRA contributions (1=maximum)		
Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)		

OTHER GOVERNMENT FORMS - DEDUCTIONS

☐ Form 1098-E - Student loan interest	Attach Forms 1098	
☐ Form 1098-T - Tuition and related expenses		

AFFORDABLE CARE ACT

☐ Form 1095-A - Health Insurance Marketplace Statement	Attach Forms 1095	
☐ Form 1095- B - Health Coverage		
☐ Form 1095-C - Employer-Provided Health Insurance Offer and Coverage		

ADJUSTMENTS TO INCOME

Taxpayer:		
Self-employed health insurance premiums		
Educator expenses		
Other adjustments to income:		
Alimony paid - Recipient name & SSN		
Spouse:		
Self-employed health insurance premiums		
Educator expenses		
Other adjustments to income:		
Alimony paid - Recipient name & SSN		

MEDICAL AND DENTAL EXPENSES

Prescription medicines and drugs		
Doctors, dentists and nurses		
Hospitals and nursing homes		
Insurance premiums		
Long-term care premiums - taxpayer		
Long-term care premiums - spouse		
Insurance reimbursement		
Out-of-pocket lodging and transportation expenses		
Number of medical miles		
Other:		

TAXES PAID

State income taxes - 1/21 payment on 2020 state estimate		

2021	1040	US	Tax Organizer

TAXES PAID (continued)

	2021 Amount	2020 Amount
State income taxes - paid with 2020 state extension		
State income taxes - paid with 2020 state return		
State income taxes - paid for prior years and/or to other states		
City/local income taxes - 1/21 payment on 2020 city/local estimate		
City/local income taxes - paid with 2020 city/local extension		
City/local income taxes - paid with 2020 city/local return		
State and local sales taxes (except autos and special items)		
Use taxes paid on 2021 purchases		
Use taxes paid on 2020 state return		
Sales tax on autos not included above		
Sales taxes paid on boats, aircraft, and other special items		
Real estate taxes - principal residence		
Real estate taxes - property held for investment		
Foreign income taxes		
☐ Personal property taxes (including automobile fees in some states)	Attach Tax Notice	

INTEREST PAID

	2021 Amount	2020 Amount
Home mortgage interest and points paid:		
☐	Attach Forms 1098	
☐		
Home mortgage interest not on Form 1098 (include name, SSN, & address of payee):		
Points not reported on Form 1098:		
Mortgage insurance premiums on post 12/31/06 contracts		
Investment interest (interest on margin accounts):		
Passive interest		

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

	2021 Amount	2020 Amount
Volunteer expenses (out-of-pocket)		
Number of charitable miles		

NONCASH CONTRIBUTIONS

NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied.

	2021 Amount	2020 Amount

MISCELLANEOUS DEDUCTIONS

	2021 Amount	2020 Amount
Union and professional dues		
Tax return preparation fee		
Safe deposit box rental		
Investment expenses		
Estate tax, section 691(c)		
Unreimbursed employee expenses:		
Other:		

2021	1040	US	Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2021 please check the appropriate box and provide the form and any additional information if necessary. Questions are continued on the back of each page as well.

Answer "no" for anything that is not applicable.

I. PERSONAL INFORMATION

Yes	No	
☐	☐	1. Did your filing or marital status change during the year?
☐	☐	2. Did your mailing address change during the year? *Please check address in organizer, or complete client info sheet if new client.*
☐	☐	3. Could you be claimed as a dependent on another person's tax return for 2021?

II. DEPENDENTS

Yes	No	
☐	☐	1. Were there any changes in dependents?
☐	☐	2. Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2021?
☐	☐	3. Did you have any children under age 19 or full-time students under age 24 at the end of 2021, with interest and dividend income in excess of $1,100, or total investment income in excess of $2,200?
☐	☐	4. Are you claiming a dependent and you are NOT the custodial parent? *Form 8332, Release of Exemption, is REQUIRED.*
☐	☐	5. Do you have any qualified dependent care expenses?
☐	☐	6. Did you receive an advance on the child tax credit? *If yes, how much*________________________?

III. HEALTH CARE COVERAGE

Yes	No	
☐	☐	1. Did you, your spouse or dependents receive IRS document Form 1095-A (Health Insurance Marketplace Statement,) if yes, please provide. **Mark no if you have employer provided insurance.**
☐	☐	2. Did you use funds from a Health Savings Account (HSA)? (HSA is not a flex account) *Please provide the 1099-SA*
☐	☐	3. If you received a HSA distribution, were the funds used for expenses other than medical?
☐	☐	4. Did you have a medical savings account MSA, HSA, a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

2021	1040	US	Miscellaneous Questions

IV. INCOME

Yes	No	
☐	☐	1. Did you have any changes in employment in 2021 (gained or terminated)? *Please provide all Forms W-2 and line through any terminated employers on the organizer.*
☐	☐	2. Did you receive any alimony or maintenance payments in 2021 and are you required to claim as income?
☐	☐	3. Did you receive unemployment income?
☐	☐	4. Did you receive any other form of income to report that you did not receive in a reported form such as a W-2 or 1099? (Cash or trade or exchange of services?)
☐	☐	5. Did you receive unreported tip income of $20 or more in any month?
☐	☐	6. Did you receive any disability income?
☐	☐	7. Did you have any gambling winnings in 2021? *If yes, please provide amount of winnings, Forms W-2 G, and any losses.*
☐	☐	8. Did you receive any interest income?
☐	☐	9. Did you make a qualified charitable distribution directly from your IRA account? *If yes, for how much?*_______________
☐	☐	10. Was your home rented out? *If yes, what was the number of rental days during 2021?*_____________ *Number of personal days?*_____________
☐	☐	11. Did you receive an economic impact stimulus payment? If yes, how much? round 3 (March 2021)______________ round 4 (January 2022) __________________
☐	☐	12. Did you or a business you own receive any grants, funding, PPP or EIDL loans?
☐	☐	13. Self employed only; Jan-Mar 2021; were you unable to work due to COVID-19 sickness, care or quarantine? If yes, how many days? Self:____ Care of family:_____

V. PURCHASES, SALES AND DEBT

Yes	No	
☐	☐	1. Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
☐	☐	2. Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? *If yes, please provide a list with the date and value.*
☐	☐	3. Did you buy or sell any stocks, bonds or other investment property in 2021? *If yes, please make sure you provide the cost basis information if not stated on the 1099-B.*
☐	☐	4. Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2022?
☐	☐	5. Did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual currency (bitcoin)? *If yes, please provide the sale and cost information.*

2021	1040	US	Miscellaneous Questions

☐ ☐ 6. Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? *Must meet requirements at energystar.gov*

☐ ☐ 7. Did you have any debts canceled or forgiven? *If yes; did your debts exceed your assets?* **Please circle: yes / no**

☐ ☐ 8. Does anyone, other than a related party, owe you money that has become uncollectible?

VI. RETIREMENT PLAN

Yes No

☐ ☐ 1. Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ ☐ 2. Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? *If so, and it is through the job for which you received a W-2, please mark YES. If not, please circle the type of plan previously mentioned and the amount paid.* $________________________

☐ ☐ 3. If eligible, would you like to contribute to a retirement plan? **Please circle: yes / no**

☐ ☐ 4. Did you transfer or rollover any amount from one retirement plan to another retirement plan?

☐ ☐ 5. Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2021?

VII. EDUCATION

Yes No

☐ ☐ 1. Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? *Form 1098-T is required.*

☐ ☐ 2. Did anyone who was a student on your return receive any scholarships during the year that are not included on the 1098-T?

☐ ☐ 3. Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? Reported on Form 1099-Q.

☐ ☐ 4. Did you pay interest on a student loan? *If yes, please include Form 1098-E.*

☐ ☐ 5. Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?

VIII. ITEMIZED DEDUCTIONS

Yes No

☐ ☐ 1. Did you pay mortgage interest on your primary or secondary home?

☐ ☐ 2. Did you purchase, sell, or refinance your principal home or second home? *If yes, please provide settlement/closing statements from your title company.*

☐ ☐ 3. If you have a home equity loan, was it used to improve or acquire your principal or second home?

2021	1040	US	Miscellaneous Questions

☐ ☐ 4. Did you pay real estate taxes in 2021? Please include the itemized receipt unless paid through escrow and reported on 1098 from mortgage company.

☐ ☐ 5. Did you pay personal property taxes in 2021, such as taxes on auto, motorcycle, or boat? Please include the itemized receipt.

☐ ☐ 6. Did you make charitable contributions in 2021? If yes, how much?__________________ If $250 or more you have to have a receipt from the qualifying 501(c)(3) organization. Even if you do not itemize; CARES act allows $300 single/$600 MFJ.

☐ ☐ 7. Did you give non-cash charitable contributions (such as clothing, household items, toys, etc.) in 2021? Please provide itemized receipt including fair market value of donation. $___________________

☐ ☐ 8. Did you incur a loss because of a federal declared disaster?

☐ ☐ 9. Did you pay any interest on a loan purchased for an investment purpose? (other than your primary residence)

IX. OTHER DEDUCTIONS AND ADJUSTMENTS TO INCOME

Yes No

☐ ☐ 1. Did you use your car for your business? (W-2 employees cannot deduct) *If yes, make sure you have evidence to support your deduction such as a mileage log*

☐ ☐ 2. Was your home used for business regularly and exclusively, qualifying you for a home office deduction? (W-2 employees cannot deduct) *If yes, please be sure to provide business and total home square footage.*

☐ ☐ 3. Did you pay alimony in 2021, that you are allowed to deduct and the recipient is claiming as income? *If yes, please provide the amount paid, recipient's name and social security number, and date of the divorce decree.*

X. ESTIMATED TAXES

Yes No

☐ ☐ 1. Did you make estimated or extension tax payments during the year? Please provide the amounts and dates.

☐ ☐ 2. If you have an overpayment of 2021 taxes, do you want the excess applied to your 2022 estimated tax (instead of being refunded)?

☐ ☐ 3. Do you expect your 2022 taxable income and withholdings to be different from 2021? *If so, please elaborate. There is a spot with more room in the organizer.*

☐ ☐ 4. If you owe more on your return this year, would you like us to calculate estimated tax payments, or adjust your withholdings? (Additional fee applies)

XI. MISCELLANEOUS

Yes No

☐ ☐ 1. We are required by law to electronically file your tax return. Would you prefer to manually file your return instead? An additional fee of $100 will be added for manually filed returns.

2021	1040	US	Miscellaneous Questions

☐ ☐ 2. Do you want to allocate $3 to the Presidential Election Campaign Fund?

☐ ☐ 3. If applicable, does your spouse want to allocate $3 to the Presidential Election Campaign Fund?

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

☐ ☐ 5. Did you engage the services of any household employees such as babysitters, caretakers, maids, etc, that are NOT employed with a company?

☐ ☐ 6. Did you or your spouse make any gifts to an individual that total more than $15,000, or any gifts to a trust?

☐ ☐ 7. Were you (or your spouse) provided an identity theft PIN from the IRS? ***If yes, please provide IRS letter with the PIN #.***

☐ ☐ 8. Did you receive any IRS or state correspondence regarding changes to your tax or tax payments, or were any audits conducted? *Please provide notices received.*

Yes No

XII. FOREIGN ACCOUNTS AND TRANSACTIONS

☐ ☐ 1. Did you have any foreign income or pay any foreign taxes?

☐ ☐ 2. Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account in which the balance exceeded $10,000 USD at anytime in 2021?

☐ ☐ 3. Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?

Yes No

XIII. STATE INFORMATION

☐ ☐ 1. Did your state of residence change during the year? If yes, please provide the dates in each state. ____

☐ ☐ 2. Did you make contributions to a state 529 Educational Plan/Learning Quest? *If yes, how much did you pay in total and per beneficiary?*___________________ __________________

☐ ☐ 3. For KS residents: Did you make any purchases out of state and not pay sales tax (ex. Amazon purchases, not including digital services or e-books)? *If yes, please provide the total amount of these purchases.*__________________________

☐ ☐ 4. For MO residents: Did you make any cumulative purchases out of state and not pay sales tax in excess of $2,000?

☐ ☐ 5. Did you work for a company located in KCMO? ***If yes,*** *do you need to request a refund for days worked outside of KCMO?* circle yes / no *We do charge additional to prepare.*

2021	1040	US	Miscellaneous Questions

Yes	No	XIV. PAYMENT AND PICKUP
☐	☐	1. If you have a refund, would you like it directly deposited into your bank account? *If yes, please provide a voided check (unless we have your account information on file already)* **last four of bank account is _ _ _ _** *If no information is provided, a paper check will be issued.*
☐	☐	2. If you owe money; would you like a direct withdrawal on 4/15 (or 10/15 if on extension) of your balance due? *If yes, please provide a voided check (unless we have your account information on file already).* **last four of bank account is _ _ _ _** *If no information is provided, you will be required to mail in a check for the balance due.*
☐	☐	3. Would you like your estimated tax payments to be automatically withdrawn on the due date, if possible? (4/15/2022, 6/15/2022, 9/15/2022, 1/15/2023)

4. How would you like to receive your tax return? **please circle all that apply**

EMAIL PICK UP PAPER MAIL PAPER($25 fee)

5. How would you like to receive your organizer next year? **circle one**

PAPER - MAILED E-ORGANIZER EMAILED PDF INTUIT LINK

Printed Client Name____