

2020 Client Tax Organizer

Tax returns completed by O'Donnell and Company, Inc. will NOT be released to client if full payment for preparation is not received. Electronic signature forms will not be accepted for transmission to tax authorities until full payment is received.
Please be prepared to pay for your tax return preparation fee at the time of completion.

Personal Information	TAXPAYER	SPOUSE
Name		
Filing Status		
Phone Number		
Email Address		
IRS PIN (only if applicable)		
IF WE HAVE THE FOLLOWING INFORMATION ON FILE SKIP TO DEPENDENT SECTION		
Social Security number		
Date of Birth		
Occupation		
Street Address		
City/State/Zip		
PA Local Resident Code		
PA School District Code		
Legally Blind		
Did you receive an Economic Impact Payment?	Stimulus Amount received - 1st payment \$ _____ Include IRS Notice 1444	Stimulus Amount received - 2nd payment \$ _____ Include IRS Notice 1444-B

Dependents Children 18 or younger that lived with you or a child that was age 19-23 and attended school full-time. If the child graduated from high school or college during 2020 they are considered a full-time student.

Are you a non-custodial parent claiming this dependent? If yes, supply Form 8332 signed by the custodial parent

Note: If you claimed this depended last year you can fill the date of birth and social security information with "ON FILE"

Name	Date of Birth	Social Security Number	Full time student	School year	Do you have health insurance for this child	Dependent's gross income

Other Dependents Other household members you want to claim as a dependent (test requirement must be met)

Name	Date of Birth	Social Security Number	Relationship	2020 Gross Income	# of Months resided in your home	% of support received from you

Electronic Filing: **A bank account is NOT required for electronic filing.** If you do not provide banking information a check will be mailed to you if you are entitled to a refund. If you have a balance due you can still file your return electronically but would need to make payment by check and voucher.

Would you like to electronically file your return? YES NO

Would you like to have your refund directly deposited into your bank account? YES NO

Direct Deposit of Refunds - <i>Electronic Filing is not available for foreign bank accounts</i>				
Name of Bank	Checking/Savings	Routing Number	Account Number	Percent of Refund

Would you like to have your balance due directly withdrawn from your bank account? YES NO

Tax Due Direct Withdrawal - <i>Electronic Filing is not available for foreign bank accounts</i>				
Name of Bank	Checking/Savings	Routing Number	Account Number	Federal/State

Federal Estimated Tax Deposits			
	Date Paid	Amount	Check #
1 st Quarter			
2 nd Quarter			
3 rd Quarter			
4 th Quarter			

State of Estimated Tax Deposits			
	Date Paid	Amount	Check #
1 st Quarter			
2 nd Quarter			
3 rd Quarter			
4 th Quarter			

New Tax Law - You do not have to itemize to take a deduction for charitable contributions.

Did you make any charitable contributions for 2020? if yes, how much? \$ _____

IMPORTANT NOTE: It is your responsibility to verify that any tax payment was issued to the taxing authority by the due date. We are unable to verify any activity in your bank account. You must check with your bank regarding withdrawals or deposits into you account.

PRIVACY POLICY: We collect nonpublic information about you from information we received from you on tax organizers, tax documents, worksheets and other forms. We do not disclose any nonpublic personal information about our customers to anyone, except as required by law. We restrict access to nonpublic information about you to those members of our firm who need to know that information in order to provide services to you. We maintain physical, electronic and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

**PLEASE CHECK THE BOX IF YOUR ANSWER IS YES AND PROVIDE
DETAILS SO WE MAY CORRECTLY REPORT TO TAXING AUTHORITIES**

YES

Did you contribute (or do you plan to before April 15, 2021) to an IRA or Roth IRA for 2020?
If yes, provide details.

Did you (or plan to before April 15, 2021) contribute to your health savings account (HSA)? If yes, provide details. (Do not list employer contributions or amounts you elected to contribute under a cafeteria plan)

Did you receive rent from real estate or rental property? If yes, please provide details

Did you purchase health insurance through the Health Insurance Marketplace (Federal or State Exchange)? You **must** include form 1095A. Please review the 1095A and verify that it is accurate and agrees with your records. This form is required.

Did you pay education expenses for tuition, books and fees for yourself or your dependent? If yes, provide details and Form 1099-T.

Did you have childcare expenses? If yes, provide details which include provider's name, address, EIN or social security number and amount paid per child.

Did you purchase energy-efficient solar electricity panels, a solar water heater, fuel cells, geothermal heat pump, or small wind energy property for your primary residence? If yes, provide details

Were there any changes to federal or state returns filed in prior years? Promptly provide us a copy of any notice you receive.

Did you start a business, invest in a business or become a business owner during the year? If yes, please provide details.

Where you engaged in a transaction involving virtual currency in 2020?

Are you interested in a free consult with a financial advisor or obtaining financial advice for your investment accounts? We can schedule an informal introduction with no obligations.
Yes, schedule an introduction.

**FOREIGN INVESTMENTS, BANK ACCOUNTS AND TAXES
YOU MAY SKIP THIS SECTION IF IT DOES NOT APPLY**

**IF YOU CHECK YES TO ANY QUESTION PLEASE INCLUDE
DETAILS SO WE MAY CORRECTLY REPORT TO TAXING AUTHORITIES**

YES

Do you have any income from a foreign investment, such as interest from a foreign bank account or pay any foreign taxes? If yes, provide details.

Did you own any other foreign financial assets (such as stock in a foreign corporation or an interest in a foreign partnership) that are not held in a financial account? If yes, provide details.

Did you receive a distribution from, or were you the grantor of, or a transferor to a foreign trust? If yes, provide details.

Do you have financial accounts maintained by a foreign (non-US) bank or financial institution that totaled more than \$50,000 on the last day of the year or more than \$75,000 at any time during the year (\$100,000 and \$150,000, respectively, if married filing a joint return)? If yes you are required to file Form 8938. If yes, provide details

Did you have a financial interest in, or signature authority over, a financial account (such as a bank or securities account) located in a foreign country at any time during 2020? If yes, provide details.