

## 2020 Tax Organizer Personal and Dependent Information

### Personal Information

	<b>Name</b>	<b>SSN</b>	<b>Has IP PIN</b>	<b>Date of birth</b>
<b>Taxpayer</b>				
<b>Spouse</b>				
<b>Street address, city, state, and ZIP</b>				
	<b>Occupation</b>	<b>Daytime phone</b>	<b>Evening phone</b>	<b>Cell phone</b>
<b>Taxpayer</b>				
<b>Spouse</b>				
<b>Taxpayer email</b>				
<b>Spouse email</b>				

**Marital Status at end of 2020**

- Married
- Married filing separately
- Single
- Widow(er) If spouse died in 2020 enter the date of death \_\_\_\_\_

**Other information**

- Are you blind?  Yes  No
- Are you disabled?  Yes  No
- Are you a full-time student?  Yes  No
- Do you want \$3 to go to the Presidential Election Campaign Fund?  Yes  No

**Taxpayer**

- Yes  No
- Yes  No
- Yes  No
- Yes  No

**Spouse**

- Yes  No
- Yes  No
- Yes  No
- Yes  No

At any time during 2020 did you receive, sell, send, exchange, or acquire any financial interest in any virtual currency?  Yes  No

### Dependent Information

First and last name SSN	Has IP PIN	Relationship	Months in home	Date of birth	Disabled	Full-time student	Childcare Expenses

List dependents required to file a return \_\_\_\_\_

### COVID-19 Implications

**Yes No**

- Did you receive an Economic Impact Payment (EIP)?  
If "Yes," provide Notice 1444 from the IRS.
- Did you experience economic loss due to COVID-19 (loss of job, closed business, etc.)?
- Were you unemployed for any portion of the year due to COVID-19?
- Did you continue to receive wages from your employer even if you were unable to work?
- Did you receive a distribution from a retirement plan (401K, IRA, etc.) due to COVID-19?
- If you own a farm or business, did you continue to pay any employee while they were not working?
- If you own a farm or business, did you delay withholding FICA taxes from any employee's pay?
- If you own a farm or business, did you receive a Paycheck Protection Program (PPP) loan?  
If "Yes," was the loan forgiven or have you applied for forgiveness? \_\_\_\_\_
- If you own a farm or business and were unable to work due to COVID-19, would you have qualified for sick or family leave if employed by someone other than yourself?

### Appointment Information

Your 2020 appointment is scheduled for \_\_\_\_\_