2021 Tax Organizer GARY L. SPOON, Certified Public Accountant 6209 Forest Road Cheverly, MD 20785 Fax (301) 322-3043 Phone (301) 322-7290 Email gspoon@spooncpa.com NAME: SSN: SPOUSE: SSN: ADDRESS: **HOME PHONE:** CITY/STATE/ZIP WORK PHONE: EMAIL ADDRESS: **DEPENDENTS** ESTIMATED TAXES PAID Name SSN DateBirth Relationship Date Paid Fed Amt St Amt W-2 INCOME Box 1 Box 18 Box 2 Fed W/H State W/H Employer Wages TS* TS TS T S ΤS State Tax Refund Received in 2021 Name of State Interest Income Dividend Income Company Amount Company Amount TSJ* TSJ ADJUSTMENTS TO INCOME Other Income (1099Misc, K1, Alimony) Indiv Retirement Account for 2021 Source Amount TSJ Type: Regular, Non-Deductible, Roth TSJ Self EmployedHealth Insurance TSJ Penalty on Early Withdrawals TSJ Alimony Paid Moving Expenses TSJ Other

TSJ

SCHEDULE OF DEDUCTIONS				
MEDICAL EXPENSES	MISCELLANEOUS			
Medical Insurance	Union Dues			
Doctor/Dentists	Job Search Expenses			
Prescriptions	Uniform Purchases			
Xrays/lab	Uniform Cleaning			
Nursing Care	Small Tools/Safety Equip			
Hospital	Job Supplies/Log Books, Etc			
Rehabilitation	Professional Publications/Dues			
Medical Aids	Education required to maintain skills			
Transportation	Tax Preparation			
Mileage	Safety Deposit Box			
Parking, Other	Other			
TAXES	EMPLOYEE BUSINESS EXPENSE			
State Tax Withheld	Vehicle Mileage or Expense			
State Tax Paid with 16 Return in 2021	Parking/Tolls/Limo Tips			
Real Estate Taxes				
	Meals Away from Home	Lodging Moals Away from Homo		
Personal Property Tax	Travel to Second Location (miles)			
Other INTEREST PAID	Gambling Loss to Extent of Winnings			
INVIERCEOT I / ND		CHILD CARE (include SSN, Address & Amount)		
Home Mortgage to Bank Deductible Points Home Equity Mortgage Home Mortgage to Individuals	TUITION (Higher Education)			
Investment Interest Expense	Please bring the following to the inte	rview:		
Educational Loan Interest Expense	Residence Settlement Sheet			
	Mortgage Interest Statement (1098)			
CONTRIBUTIONS	Record of Stock Transactions			
Cash Contributions	Include Purchase Date and Cost			
	Log of Travel Expenses			
	Vehicle Purchase Info - If Used in Job			
	EOY Pay Statement for Union Dues, Et	C		
	W-2 Forms			
	All 1099's (Interest Dividends, Etc.)			
	Health Insurance 1095 A/B/C			
Non-Cash (clothes, household Items, etc)	Last year's Tax Return			
	Notes & Comments:	.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1		
	Client Signature			

		Page 3				
RENTAL INCOME/EXPENSE						
PROPERTY	Α		В			
Location						
Nr Days Personal U	se					
Purchase Price						
Improvements						
Date Purchased						
Date First Rented						
Rents Received						
EXPENSES						
Advertising						
Travel						
Cleaning						
Maintenance						
Commissions						
Insurance						
Legal/Accounting						
Management Fee						
Mortgage Interest						
Other Interest						
Repairs						
Supplies						
Taxes						
Utilities						
Condo Fees						
Telephone						
Pest Control						
Other (List)						
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Depreciation						
(I will calcuate)						
TOTAL EXPENSE						
NET INO IL OCC						
NET INC/LOSS						
ALLOWABLE						