5680 Marsh Rd ∞ Suite B ∞ Haslett, MI 48840

PHONE: (517) 336 0151 FAX: (517) 336 6036 2TOM.ETA@GMAIL.COM

EASTSIDE TAX & ACCOUNTING, LCC &

PERSONAL DATA ORGANIZER

	HTTPS://WWW.EASTSIDETAXA	CCOUNTING.COM/				
Name:	This is your tax organizer for the 2021 Tax Year. Please complete the sections that pertain to you. Any questions or					
Date:	comments can be written in spaces choose to call the office and speak wit	provided. You may also				
Time:	DID YOU RECEIVE:					
With:	Advance Child Tax Credit -	No □ Yes□				
	\$Per payment	_/6 payments starting July 21				
PLEASE BRING THE FOLLOWING	Stimulus Check III-	No \square Yes \square				
TO YOUR TAX APPOINTMENT	(Around March 2021)					
		Amount: \$				
ALL W-2, 1099'S, K-1'S, BROKER STATEMENTS, ETC.	Direct Deposit Refund -	No \square Yes \square				
❖ Brokerage & mutual fund year-end statement						
❖ YEAR-END BANK STATEMENTS	If your filing status is Head of Household or you claim certain credits (such as: Earned Income Tax Credit, Child					
❖ Driver License						
❖ SOCIAL SECURITY STATEMENT FORM SSA-1099	Tax Credit, Other Dependent Credit, Education					
❖ PROPERTY TAX STATEMENTS	Credit) the IRS requires tax preparers to have documentation of eligibility before we can file your return. You must provide					
❖ Mortgage interest statements						
❖ MORTGAGE REFINANCE SETTLEMENT STATEMENTS	documentation proving residency and expenses.					
❖ 1098-E or 1098-T	Examples include: School or medical records, and/ or tuition					
❖ Property sales settlement statements	statement. Please call the office before					
❖ OTHER EVIDENCE OF INCOME & DEDUCTIONS	you are unsure what documentation is necessary.					
❖ Dates of birth & social security numbers for all		· ·				
❖ A CURRENT VOIDED CHECK − FOR DIRECT DEPOSIT						
❖ Cost information for stock & bonds sold	If your return includes the Earned					
❖ ACA HEALTH COVERAGE FORMS 1095-A	Additional Child Tax Credit, the IRS p	•				
❖ 1099 G Unemployment	most early refund filers to be delayed a	as usual.				
NEW CLIENTS PLEASE BRING LAST YEAR'S TAX RETURN	NOTES & QUESTIONS					

As always, we stand ready to serve all your tax, accounting, bookkeeping, payroll & financial planning needs. If you have questions about our services, call us at (517) 336 - 0151

PERSONAL	MARR	IED	SINGLE		_WIDOV	VER_			_(EX	ISTING CLI	ENTS ENTER	NAMES, S	SOC. SEC. #	& C	HANGI	Es)
Name(s)					Social Sec				te of	0	Occupation Blir		nd or Disabled Date of D		f Dooth	
Email Address:					Social S	ecum	.y #	Bi	irth	0	ccupation	Dilli	d of Disable	u	Date 0	i Deatii
Taxpayer																
Spouse																
Full Address								Phone	e#1			#2				
DEPENDEN'	ГЅ (Сн	ILDREN	& OTHERS.	EXIS	TING CLI	ENTS	S NEE	D ONL	Y ENT	ER NAMES,	Soc. Sec. #	& CHANG	ES)			
N	ame		M or F		e of rth	SS# Mo			# Months in Home	Full-time Student / Disabled Tuition & Fees (paid only)		De	Dependent Gross Income			
	Driv	ER'S LICE	NSE #			I	[SSUE	DATE		Exp	DATE	ST	CATE			
TAXPAYER																
SPOUSE													<u> </u>			
CHILDCARE PRO	OVIDER	ID	# OR SS#			ADI	DRES	S					AMT. PAI	ID	Cı	HILD
PLEASE ANSW	ER QUE	STIONS I	FOR ACCUR	ACY		YI	ES	No					l		YES	No
Are you self-en	nployed	l or recei	ve hobby in	come	?					you receiveng form 109	e Marketplac 95-A.	e health ii	nsurance?			
Do you have farm income?								r provide hea	lth insura	nce?						
Do you own re	ntal pro	perty?							Did	you pay re	nt? How muc	h? To wh	om?			
Have you purc	hased/s	sold BIT C	COIN/ CYBE	R CUR	RRENCY?					enting, do y w much?	ou pay heat?					
Did you sell/ta				utual	funds?				Do	you pay stu	dent loan int rs? (Bring 10					
(If so, bring co	st) Wor	thless se	curities?							tements)	is: (bring for	90-1 & 10	90-11			
Do you have a foreign bank account, trust or business?								under 24 yrs 1s, of \$1100 o		interest,						
Do you have income from timber?																
Did you refinance your home (bring statement)?							Did you make energy saving improvements?									
Did you contribute to or withdraw from an IRA/401(k)?						_	Did you convert an IRA to a ROTH IRA?									
Any births, deaths, marriages, adoptions or moves? Any debt cancellation or forgiveness? (bring 1099-C)							Did you give anyone more than \$15,000? Did you file bankruptcy?									
Did you receive					99-0)				DIC	you me ba	iikiupicyr					
SECURITY & P					TTIIAI EIIN	IDC E	TC)			ESTIMATE		Fenen	AL AMOUNT		STATE /	AMOUNT
	KOFEKI	Xif	Date	Da				ginal		PAYMENTS	s PAID	TEDEK	AL AMOUNT		STATE	IMOUNT
Description		Inherit	Rec'd	Sol	ld Price	e	Cos	t								

SELF-EMPLOYMENT OR ADDITIONAL INCOME

OTHER INCOME	Amount	BRING DOCUMENTATION OF AMOUNTS	AMOUNT			
Alimony Received		Child Support Received				
Scholarships & Grants		Unemployment Received –Form 1099G				
Prizes, Bonuses, Awards		Gambling & Lottery Wining – Form W2G				
Unreported Tips		If Gambling Winnings, Losses				
Director Or Executor Fees		Jury Duty				
Workers Compensation		Disability Income				
Veterans Pension		Payments from prior Installment Sales				
State Income Tax Refund		PPP LOANS (PROVIDE COPY OF FORGIVENESS LETTER)	· DATE RECEIVED			
City Income Refund		AMOUNT OF LOAN: AMOUNT	FORGIVEN:			

SELF EMPLOYED BUSINESS INCOME & EXPENSES (1099'S) – MUST HAVE DOCUMENTATION FOR THE FOLLOWING							
Gross Income	Gifts	Postage & Ship.	Wages				
Refunds	Equipment	Seminars/ Conf.	Rent Paid				
Bgn Inventory	Interest	Small Tools	Fees				
Purchases	Legal & Acctg.	Supplies	Business Insurance				
End Inventory	Labor	Taxes & License	Internet				
Advertising	Office Expense	Telephone	Other/Misc				
Bank Charges	Meals	Travel					
Dues & Pubs	Maint. & Repair	Utilities	# of days off due to Covid				

OFFICE IN HOME

RENTAL INCOME & (IF NEW RENTAL PROPER		LEMENT STATEME	ENT & TAX BILL)					
Property	Address							
1								
2								
3								
Property # Above	1	2	3					
Income								
Advertising								
Cleaning & Fees								
Commission & Fees								
Insurance								
Legal & Professional								
Mortgage Interest								
Other Interest								
Repairs								
Supplies								
Taxes								
Utilities								
Labor								
Telephone								
Other								

(USE MUST BE EXC	LUSIVE,	REGULAR & T	THE PRINCIPLE P	LACE OF BUSINESS.)
Purchase Date			Cost	
Total ft²	Business Ft ²		Rent	Utilities
Insurance	Main	tenance	Repair	other
	-END MI	LEAGES TO	TAKE AUTO DE	ENT WRITTEN RECORDS, DUCTIONS. CALL IF YOU
		Ve	hicle 1	Vehicle 2
Year/Make				
Total Miles				
Purch. Date				
Business Miles				
Commute Miles				
Interest Paid				
Oper. Cost				
Lease Cost				
Maintn. Cost				
Home to Work I	Miles			

MEDICAL/DENTAL EXPENSES PAI	O IN CURREN	T YEAR	(THESE ARE ONLY DEDUCTIBLE WHEN THEY EXC	EED 7.5% OF YOUR INCOME)				
Medical Insurance premium (paid b	y you)		Doctor, Dentist, Nursing Care, Etc.					
Long Term Care Insurance			Glasses, Contacts, Hearing Aids, Batteries, Etc.					
Prescription Drugs/ Medical Equip	& Supplies		Hospital, Nursing Home, ETC.					
Auto Mileage (for medical reasons)			Other Medical/Dental					
TAXES PAID	(BRING ALL	PROPERTY TAX	STATEMENT PAID & ASSESSED IN 2021 IF NOT PAID, INDICATE	E ONES NOT ACTUALLY PAID)				
Real Estate (property) taxes			Taxable Value from tax statement					
Auto Tags			Other					
INTEREST EXPENSES	(CREDIT C	ARD & CAR LO	AN INTEREST IS NOT DEDUCTIBLE UNLESS IT IS USED FOR HOM	E MORTGAGE OR BUSINESS)				
Mortgage Interest Paid		Land Con	ntract Paid					
Investment Margin Interest		Name	Name					
Other Investment Interest		Address_	Address					
Other Deductible Interest		Social Sec	Social Security #					
CHARITABLE CONTRIBUTION		(AMOUNT OF	\$250 & ABOVE MUST BE DOCUMENTED BY RECEIPTS THAT ME	ET THE IRS REQUIREMENT)				
Church			Public Agencies/ Public Radio					
United Way			Boy/Girl Scouts, Cancer, Lung, Etc.					
Food Banks			Michigan Wildlife / Children Fund					
Colleges & Universities			Non-Cash – Clothing, Household, Etc. Donated to St. Vincent, Salvation Army, Goodwill, Etc.					
Other:			Provide list of items donated & the FMV of each item					
	No	N ITEMIZE	LD.					
	CASH	DONATIONS	(UP TO \$300 INDIVIDUAL AND \$6	OO MARRIED FILING JOINT)				

We're Accountants for Main Street....

... Not Wall Street.