Hurst, Kelly & Company LLC
Certified Public Accountants
3293 Montgomery Road
Loveland, OH 45140
(513) 234-0977
www.hurstkelly.com

Dear New Client:

Enclosed is a 2021 Tax Organizer which we will use in preparing your 2021 tax return(s). It provides space where you may enter your 2021 tax information. As you receive your 2021 tax documents, please collect them and keep them with this organizer. These documents include such items as your W-2s, Form 1099s, K-1s, etc.

Please review the organizer and complete and update your personal information, including cell phone number(s) and email address(es), on page one. While you do not need to complete the organizer in its entirety, we ask that you complete the section on page four that includes questions with *yes* or *no* responses. If you have already prepared other schedules for the necessary information, refer to them in the organizer and enclose them for our use.

We are encouraging all clients to take advantage of the various flexible approaches we offer to provide us with their tax documentation including:

- Mailing your tax information to our office in the enclosed envelope
- Depositing your tax information in our secure drop box (available 24 hours a day, seven days a week) located just outside our office front door
- Drop off your documents in person with our office administrative assistant during our office hours. Please refer to our website at www.hurstkelly.com for the most current office hours available for in person drop offs.
- Depositing your tax documents to us electronically using our secure portal at https://hurstkelly.smartvault.com (please contact our office at 513-234-0977 to initiate your secure access to this portal)

We look forward to working with you, and as always, please contact us if you have any questions.

Sincerely,

Hurst, Kelly & Company LLC

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Important Tax Year 2021 Information

Please check our website **www.hurstkelly.com** for the most current information regarding our business processes and office hours.

Please review page 1 of the tax organizer and verify the accuracy of the telephone number(s) and email address(es) that we have on file for you and update as necessary. Please also review and complete the ***yes or no*** questions on page 4 of the tax organizer. You may also complete any other sections of the organizer that you like.

In order to have your returns prepared, reviewed and e-filed by the April 15, 2022 due date, we need to have received all of your tax information by March 15, 2022. If we haven't received all your information by this time, we may need to extend your tax return.

Tax information can be provided to our office via four methods: (1) mailing your tax information to our office in the enclosed envelope, (2) depositing it in our secure drop box located just outside our office door (for 24/7 access), (3) dropping it off in-person with our office administrative assistant during office hours, or (4) uploading it to our secure portal at https://hurstkelly.smartvault.com.

If you would like your 2021 tax return extended, contact our office at 513-234-0977. Individual tax returns (Form 1040) must be filed or extended by April 15, 2022. Business tax returns (Forms 1065 and 1120S) for December 31, 2021 year-ends, must be filed or extended by March 15, 2022. Please contact us prior to the return due date if you would like an extension filed. **We must receive a request from you in order to process and transmit the extension request**.

Taxing authorities require current driver's license or state ID information to process electronically filed returns. Please provide us with driver's license/ID information for each person in your household that our office is preparing tax returns for.

	Taxpayer	Spouse (if any)
License/ID - Full Name		
License/ID - Issuing State		
License/ID - Number		
License/ID - Issue Date		
License/ID - Expiration Date		

Did you receive any advance child tax credit payments from the Internal Revenue Service in 2021?
☐Yes (**if yes, complete the table below**) ☐No

Date Received	Amount Received
July, ____ 2021	$
August, ____ 2021	$
September, ____ 2021	$
October, ____ 2021	$
November, ____ 2021	$
December, ____ 2021	$

Did you receive the 3rd stimulus payment from the Internal Revenue Service in 2021 – the base amount of this round of stimulus was $1,400 per person and began being paid as of March 12th, 2021?
☐Yes (**if yes, complete the table below**) ☐No

Date Received	Amount Received
___________ ____, 2021	$

If you have a Heath Savings Account (HSA) and distributed any funds from the account during 2021, you will need to provide to our office a Form 1099-SA to accurately prepare your tax returns. Note that while some banks mail this form, most banks no longer mail these, and as such, you will need to log into your HSA account, and download and print the 2021 Form 1099-SA.

If you (or a dependent of yours) was enrolled in a college or university at any time during 2021, the respective college or university that billed tuition in 2021 will generate a Form 1098-T that our office needs to accurately prepare your 2021 return. These forms are not mailed and must be retrieved by logging into your account at the college or university. Please download and print any such Forms 1098-T and provide them to our office along with a listing of any other post-secondary educational expenses you paid in 2021.

2021 Tax Organizer

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2021 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2021 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2020 information is included for your reference. You do not need to make any 2020 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- ☐ A copy of your 2020 tax return (if not in our possession).
- ☐ Original Form(s) W-2.
- ☐ Schedule(s) K-1 and K-3 showing income or loss from partnerships, S corporations or estates or trusts.
- ☐ Copies of other compensation or pension documentation, such as Form 1099-MISC, Form 1099-R, or Form 1099-NEC.
- ☐ Form(s) 1099 or statements reporting dividend and interest income.
- ☐ Brokerage statements showing transactions for stocks, bonds, etc.
- ☐ Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- ☐ Copies of closing statements regarding the sale or purchase of real property.
- ☐ All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

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LOVELAND, OH 45140
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2021
TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name		Last name	
First name		First name	
Middle Initial	Suffix	Middle Initial	Suffix
Social security number		Social security number	
Occupation		Occupation	
Work phone	Ext	Work phone	Ext
Cell phone		Cell phone	
E-mail address		E-mail address	
Date of birth		Date of birth	

Address ____ Apartment number ____

City ____ State ____ ZIP Code ____

Home phone ____ Fax number ____

Dependent Information

First name / Last name	MI / Suffix	Social Security Number / Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2021 qualified student loan interest ____

Attach Form(s) W-2 — Wages, Salaries, Tips and Other Compensation

Employer Name	2020 Amount

Attach Form(s) 1099-R — Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	2020 Amount

Attach Form(s) SSA-1099 — Social Security/Railroad Benefits

	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099		
Railroad Retirement Benefits from Form RRB-1099		
Medicare B premiums withheld		
Medicare C premiums withheld		
Medicare D premiums withheld		

Attach Form(s) 1099-MISC — Miscellaneous Income and 1099-NEC

1099-MISC Payer Name and 1099-NEC Payer Name

Attach Form(s) 1099-INT — Interest Income

1099-INT Payer Name	2020 Amount

Attach Form(s) 1099-DIV — Dividend Income

1099-DIV Payer Name	2020 Amount

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G — Certain Government Payments, Schedule K-1s — Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G — Gambling or Lottery Winnings, Form(s) 1099-Q — Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

	Taxpayer	Spouse
Traditional IRA contributions made for 2021		
Roth IRA contributions made for 2021		
SEP, Keogh, Individual 401(k) or SIMPLE Contributions		

Medical and Dental Expenses

	2021 Amount	2020 Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses:		

Taxes

	2021 Amount	2020 Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		

Interest Expenses

Home mortgage interest paid — Attach Form(s) 1098.

Lender's Name	2021 Amount	2020 Amount

Points paid on loan to buy, build or improve main home

Lender's Name	2021 Amount

Cash/Check/Credit Contributions

	2021 Amount	2020 Amount

Noncash Charitable Contributions

Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Miscellaneous Deductions

	2021 Amount	2020 Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list):		

		Yes	No
1	Did you receive an Economic Impact (Stimulus) Payment?	☐	☐
	If yes, how much did you receive?		
2	Did you receive any Advanced Child Tax Credit payments?	☐	☐
	If **yes**, how much did you receive?		
3	Did a lender cancel any of your debt in 2021? (Attach any Forms 1099-A or 1099-C)	☐	☐
4	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2021? If **yes,** please attach details	☐	☐
5	Did you purchase a motor vehicle or boat during 2021 ? If **yes,** attach documentation showing sales tax paid.	☐	☐
6	Did you purchase a hybrid or electric vehicle in 2021? If **yes,** enter year, make, model, and date purchased:	☐	☐
7	Did you donate a vehicle in 2021? If **yes,** attach Form 1098C	☐	☐
8	What was the sales tax rate in your locality in 2021 ? ______ % State ID ______		
9	Did your marital status change during 2021? If **yes,** explain:	☐	☐
10	Were you or your spouse permanently and totally disabled in 2021?	☐	☐
11	Do you have dependents who must file?	☐	☐
12	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $2,200?	☐	☐
13	Did you provide over half the support for any other person during 2021?	☐	☐
14	Did you incur adoption expenses during 2021 ?	☐	☐
15	Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	☐	☐
16	Did you receive any disability payments in 2021 ?	☐	☐
17	Did you receive tip income **not** reported to your employer?	☐	☐
18 a	Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2021 ? If **yes,** attach closing or escrow statements, 1099-C or 1099-A forms	☐	☐
b	If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?	☐	☐
19	Did you incur any casualty or theft losses during 2021 ?	☐	☐
20	Did you incur any non-business bad debts?	☐	☐
21	Did you pay any individual for domestic services in 2021 ?	☐	☐
22	Did you take a retirement account distribution related to the corona virus or a natural disaster?	☐	☐
23	Did you buy or sell any stocks or bonds in 2021 ?	☐	☐
24	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
25	Did you incur any moving expenses? If **yes,** attach details	☐	☐
26	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐
27	Do you expect your income and deductions in 2022 to be the same as 2021 ? If **no,** attach explanation of changes expected.	☐	☐
28	Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach	☐	☐
29	At any time during 2020, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	☐	☐
30	**a** Did you obtain a Paycheck Protection Program (PPP) loan?	☐	☐
	b If yes, has any portion of that loan been forgiven?	☐	☐
31	If you paid any alimony, enter recipient's SSN: ______ Alimony paid: ______		
32	Enter your state of residence **Taxpayer** ______ **Spouse** ______		
33a	Do you want to change the language with which the IRS communicates with you?	☐	☐
b	If yes, which language?		

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

If **yes,** please provide a voided check (not a deposit slip) if your bank account information has changed.

What type of account is this? Checking ☐ Savings ☐

Estimated Tax Paid

Federal		State			Local		
Date	**Amount**	**Date**	**Amount**	**ID**	**Date**	**Amount**	**ID**

Additional Information (Enter any additional information here and attach any documents.)

Health Insurance Coverage

ORG3A

Preparer note: The fields on this form are non-enterable. This worksheet is meant to gather client data only. This worksheet will not transfer to the ProSeries/1040 product. Data from this worksheet must be manually entered on the appropriate form in ProSeries/1040.

Part 1 **Coverage**

Enter the name, SSN/DOB and health insurance status for each person who will claim on your return in the table below:

Indicate which months each person was covered by MEC*:

Name of covered individual(s)	SSN or DOB	Covered 12 mos	Exchange Policy	Exemption Received	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1.																
2.																
3.																
4.																
5.																
6.																
7.																
8.																
9.																

*Minimum Essential Coverage (MEC) includes employer-sponsored coverage, health insurance purchased through the Health Insurance Marketplace (Exchange), Medicare, Medicaid, certain VA coverage, Tricare, etc.

For tax year 2020, the Federal ACA tax penalty has been eliminated, however, you may still be subject to a state tax penalty depending on where you live because some states have created their own individual insurance mandates to replace the federal version. These mandates require state residents to have qualifying health coverage or pay a fee with their state taxes.

Use this worksheet to list the names of individuals listed on the income tax return and their health care insurance coverage status. It will help your tax preparer determine who has health insurance coverage.

If you purchased a health insurance policy from an exchange (or Marketplace), check the Exchange Policy box above. You will receive Form 1095-A from the exchange that issued your policy. Please provide this form with your Organizer documents to your tax preparer.

Please call with any questions on this worksheet.