# Jason Anakkala Ltd.

Certified Public Accountant & Consultants

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## **2021 INDIVIDUAL INCOME TAX ORGANIZER**

PLEASE DELIVER YOUR INFORMATION TO US BY \_\_\_\_\_

TAXPAYER INFORMATION			SPOUSE INFORMATION					
First M Last		First	M Last					
SS # DOB		SS #			DOE	3		
Occupation			າ					
Address		Address						
City	State Zip	City			State	Zip		
	Work							
			 Email					
Are you legally blind or disable			gally blind or dis					
		DEPENDENTS						
		DEPENDENTS	Months in	Grade at	Daycare	Income	Full Time	
<u>Name</u>	Birthday SS #	<u>Relation</u>	<u>Home</u>	12/31	Costs	Earned	Student	
	1 1						Y/N	
							Y / N	
							Y / N	
							Y / N	
							Y / N	
							1 / 14	
	<b>DEPENDENT</b> For dependents under age 14, or if dependent	AND CHILD CARE EX		o of caring for	homsolvos			
Name of Provider	Address		D - Required	_	nt Paid	Children	Cared For	
		1			<u></u>			
					***			
	Are you enrolled in your employer's Fle	x Plan? Usually, this is the	best way to hand	lle child care co	15.			
TH		x Plan? Usually, this is the	•			9/W-2		
TH	Are you enrolled in your employer's Fle.	x Plan? Usually, this is the	•		NOT ON 1099	9/W-2		
		x Plan? Usually, this is the	•		NOT ON 1099	9/W-2 \$		
Last Paystub of the Year		x Plan? Usually, this is the	•		NOT ON 1099			
Last Paystub of the Year W-2 Forms for Wages 1099-R for Retirement	IINGS TO BRING	x Plan? Usually, this is the	•		NOT ON 1099	\$ \$ \$		
Last Paystub of the Year W-2 Forms for Wages 1099-R for Retirement 1099's for Interest, Dividends,	IINGS TO BRING and Other Income	x Plan? Usually, this is the	•		NOT ON 1099	\$ \$ \$ \$		
Last Paystub of the Year W-2 Forms for Wages 1099-R for Retirement 1099's for Interest, Dividends, K-1's for Partnerships, Corpora	and Other Income	x Plan? Usually, this is the	ОТНЕ	ER INCOME I	NOT ON 1099	\$ \$ \$ \$		
Last Paystub of the Year W-2 Forms for Wages 1099-R for Retirement 1099's for Interest, Dividends, K-1's for Partnerships, Corpora	and Other Income ations or Estates enefits		ОТНЕ	****NEW F	NOT ON 1099	\$ \$ \$ \$		
Last Paystub of the Year W-2 Forms for Wages 1099-R for Retirement 1099's for Interest, Dividends, K-1's for Partnerships, Corpora 1099-SSA for Social Security Be	and Other Income ations or Estates enefits	□ Stimulus P	ОТНЕ	****NEW F	OR 2021****	\$ \$ \$ \$ \$		
Last Paystub of the Year W-2 Forms for Wages 1099-R for Retirement 1099's for Interest, Dividends, K-1's for Partnerships, Corpora 1099-SSA for Social Security Be 1099-SA for Health Savings Ac	and Other Income ations or Estates enefits counts nrough MNSure or the Marketplace	□ Stimulus P	OTHE	****NEW F 1444-C or Let pring \$1400/	OR 2021**** ter 6475 person)	\$ \$ \$ \$ \$	lit**	
Last Paystub of the Year W-2 Forms for Wages 1099-R for Retirement 1099's for Interest, Dividends, K-1's for Partnerships, Corpora 1099-SSA for Social Security Be 1099-SA for Health Savings Act 1095-A for Health Insurance th Voided Check(s) for Direct Dep	and Other Income ations or Estates enefits counts nrough MNSure or the Marketplace posit dent Loan Interest, College Tuition	□ Stimulus P	OTHE ayment Notice d last March/S	****NEW F 1444-C or Let pring \$1400/	OR 2021**** ter 6475 person)	\$ \$ \$ \$ \$	lit**	
Last Paystub of the Year W-2 Forms for Wages 1099-R for Retirement 1099's for Interest, Dividends, K-1's for Partnerships, Corpora 1099-SSA for Social Security Be 1099-SA for Health Savings Ac 1095-A for Health Insurance th Voided Check(s) for Direct Dep 1098's: Mortgage Interest, Stu 1 Closing Papers for Real Estate	and Other Income ations or Estates enefits counts nrough MNSure or the Marketplace	Stimulus P (Rec'	ayment Notice d last March/S 6419 for those	****NEW F 1444-C or Let pring \$1400/ that received ORMATION	OR 2021**** ter 6475 person) the advance of	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	lit**	
Last Paystub of the Year W-2 Forms for Wages 1099-R for Retirement 1099's for Interest, Dividends, 1099-SSA for Social Security Be 1099-SA for Health Savings Ac 1095-A for Health Insurance th Voided Check(s) for Direct Dep 1098's: Mortgage Interest, Stu Closing Papers for Real Estate	and Other Income ations or Estates enefits counts nrough MNSure or the Marketplace posit dent Loan Interest, College Tuition purchases & sales, including Refinances	Stimulus P (Rec'	ayment Notice d last March/S	*****NEW F 1444-C or Let pring \$1400/ that received ORMATION e need this for	OR 2021**** ter 6475 person) the advance of	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	lit**	
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Failure to complete this organizer will jeopardize our ability to prepare an accurate tax return. Please complete!

ADJUSTMENTS TO INCOME			DEDUCTIONS		
RETIREMENT PLA	NS		MEDICAL AND DENTAL EXPENSES		
	<u>Taxpayer</u>	<u></u>	* Do not include amounts withheld pre-tax from your wages.		
Covered by a retirement plan at work?	Y/N	Y/N	Health Insurance Premiums * \$		
Contributions already made for 2021:			Medicare Premiums \$		
Traditional (Regular) IRA	\$	\$	Long Term Care Insurance \$		
Roth IRA	\$	\$	Insur Co Policy Number		
SEP/Simple	\$	\$	Vision Insurance Premiums * \$		
Did you convert an IRA to a ROTH IRA?	Y / N	Y/N	Dental Insurance Premiums * \$		
Calculate possible retirement plan options	Y/N	Y/N	Prescription Medicine / Drugs \$		
with this return? (IRA, Roth, SIMPLE, HSA	, etc.)		Doctors, Dentists, Hospitals \$		
2021 IRA Limit: \$6000; age 50 or	older \$7000		Labs, X-Rays \$		
			Eye Glasses, Contact Lens \$		
HEALTH SAVINGS ACC	OUNTS		Hearing Aid, Supplies, Repair \$		
Contributions to HSA	\$	\$	Special Medical Apparatus \$		
Distributions from HSA	\$	\$	Ambulance \$		
2021 HSA Limit: Single \$3600; Family \$7200; ove	r age 54 +\$1000		\$		
STUDENT LOAN INTERES	T/CREDIT		\$		
	<u>Taxpayer</u>	<u>Spouse</u>	\$		
Student Loan Interest Paid	\$	\$	Travel for Medical Miles		
You also need to provide Form	1098-E.		Lodging Away From Home \$		
Total amount of loan payments			Number of Nights		
made in 2021 (principal + interest)	\$	\$	HSA or Medical Reimbursements \$		
Original amount of student loans	\$	\$	(If above are gross expenses)		
MISCELLANEOUS	S	•	REAL ESTATE TAXES (Excluding Special Assessments)		
Educator Expenses (supplies, etc. )	\$	\$	Provide actual 2021 property tax statements.		
			Primary Residence \$		
ENERGY TAX CREI	DITS		Second Residence \$		
Must be on your primary	residence.		Land <u>\$</u>		
			Property Tax Refund Received in 2021 \$		
Windows, exterior doors, skylights		\$			
Storm doors, windows		\$	VEHICLE LICENSE FEES (Cars & Trucks Only)		
Furnace and/or air conditioner		\$	Year/Make/Model Amount		
Insulation		\$	\$		
Water heater		\$	\$		
Metal or asphalt roof w/ cooling granules		\$	\$		
Geothermal heat pumps		\$			
Wind turbines		\$	SALES TAX PAID ON LARGER PURCHASES		
Solar panels		\$	New/Used <u>Description</u> <u>Amount</u>		
Fuel cell property		\$	\$		
			\$		
	AFTER HIGH S	SCHOOL EDUCA	TIONAL EXPENSES		
Pay for or incur a loan for college or voc	cational costs last y	ear? We <b>must</b> have	the 1098-T and an account activity statement from the school.		
	<u>Pa</u>	rent(s)	<u>Dependent 1</u> <u>Dependent 2</u> <u>Dependent 3</u>		
Year of school					

Y/N

Y/N

Y/N

Y/N

Name of school attended

Expenses paid by parents?

Tuition/fees

Books and supplies

## **DEDUCTIONS (Continued) INTEREST PAID - Bring 1098 Forms** 1st Mortgage - Primary Residence Ending Balance as of 12/31/21 2nd Mortgage - Second Home / Land Ending Balance as of 12/31/21 What was the loan used for? Home Equity Loan Ending Balance as of 12/31/21 What was the loan used for? Contract for Deed Ending Balance as of 12/31/21 Also list recipient's name, address, and SS#: **Investment Interest** \$ Paid to: Loan Purpose: Note: Bring closing (settlement) statements for any property refinanced, sold or purchased during year. CONTRIBUTIONS: NEW LAW-fill this out even if you do short form Generally, you must have a receipt for charitable donations. Our office does not need copies, you keep. Do you have receipts to support your donations? Y/N**Cash Contributions** Church Others - Please list Total Charitable Mileage Miles Other Than Cash **ESTIMATED TAX PAYMENTS** Be careful. Incorrect data will result in notices and penalties from tax authorities. **FEDERAL** Date Paid <u>Amount</u> Applied from Prior Year's Return Vehicle 2 1st Qtr - Due 4/15/21 2nd Qtr - Due 6/15/21 3rd Qtr - Due 9/15/21 \$ 4th Qtr - Due 1/15/22 \$ **STATE Date Paid Amount** Applied from Prior Year's Return 1st Qtr - Due 4/15/21 \$

\$

\$

\$

2nd Qtr - Due 6/15/21

3rd Qtr - Due 9/15/21

4th Qtr - Due 1/15/22

#### **NOTEWORTHY**

- -If you received an advance child tax credit during the year, your refund this year may be greatly reduced.
- -The Day care credit was signficantly increased for 2021.
- -Less people will have to payback MNSure credits in 2021.
- -RMD's were required in 2021.
- -Virtual Currency is one of IRS's biggest issues.

#### MISCELLANEOUS DEDUCTIONS

Gambling Losses (Limited to Winnings)

### **MINNESOTA ITEMS**

### **529 PLAN DEDUCTION - MINNESOTA RETURNS**

If you contribute to a Section 529 College Savings Plan, you may be eligible for a credit or deduction. Please provide the following information for each 529 Plan account.

h				
account.				
Trustee:				
Account Number:				
Amount Contributed in 2021	\$			
Distributions in 2021	\$			
Trustee:				
Account Number:				
Amount Contributed in 2021	\$			
Distributions in 2021	\$			
EMPLOYEE WORK EXPENSES				
(These are deductible for Minnesota only.)				
	Taxpayer	Spouse		
Union and Professional Dues	\$	\$		

	Taxpayer	эройзс
Union and Professional Dues	\$	\$
Uniforms and Laundry	\$	\$
Work Tools, Supplies and Equipment	\$	\$
Continuing Education and Seminars	\$	\$
Business Publications, Books and Mags	\$	\$
Travel (Lodging, Airfare, Car Rental)	\$	\$
Make/Model	Work miles	Total miles
Vehicle 1		•

ehicle 2

Commuting to/from work is generally not deductible.

## **ITEMS TO DISCUSS WITH PREPARER**

MISCELLANEOUS QUESTIONS Please review the following questions. Please circle Yes or No. If not circled, we assume you reviewed and it does not apply to your return. Any births, adoptions, miscarriages, marriages, divorces, deaths or name changes in your immediate family in 2021? Y/NDid the taxpayer and spouse live apart for the entire last 6 months of the year or longer? Y/NY/N Do you have a mentally or physically disabled child? Any changes in dependents in 2021? If so, please explain: Y/N Y/NCan anyone claim you as a dependent? Y/N Divorced parents claiming non-custodial children are required to have a special form signed. Is this you? Y/NMade gifts of more than \$15,000 to any individual? If yes, provide details. Y/NAre you receiving a military pension or other military retirement pay? Wish to donate to the MN Non-Game Wildlife Fund? If yes, please indicate amount \$ . Y/N Y/NReceive any notices from any tax authorities? If yes, provide copies. Did either you or your spouse turn age 72 this year? Minimum retirement distributions are required. Do you need assistance in calculating the Y/N necessary distribution? Want us to prepare a MN Renter or Homeowner Property Tax Refund for 2021? If yes, please provide real estate tax statements or Certificate of Y/NRent Paid. Receive/pay alimony or child support during the year? If yes, provide amount paid, name & address of recipient. Y/N Y/NReceive any tax-exempt interest during the year? If yes, provide us with a list of accounts and amount received. Y/N Did you or a dependent receive any scholarships or grants in 2021? Y/NRefinance your home this year? Bring in closing statement and/or contract. Y/N Buy or sell any property or investments this year? Bring in closing statement and/or contract. Y/NAdd someone (or were you added) to the title or deed of a property, such as a life estate? Do you want us to prepare Quarterly tax estimate vouchers for you for 2022? Y/NAny income from or pay taxes to a foreign country, have a foreign account or own property in a foreign country? MUST ANSWER Y/N Y/N Receive, sell, send, exchange, or otherwise dispose of any financial interest in any virtual currency? MUST ANSWER Y/NPay a household employee over \$1,900? Go through bankruptcy, foreclosure, or repossession proceedings? Considering? Y/NMoved during 2021 or have a change of residence or job location during the year? Y/N Y/NReside in more than one state during the year? Y/N Earn income from a state other than the state in which you live? Y/NReceive any disability income during the year? Y/N Receive a Schedule K-1 from a partnership, S Corp or trust? Y/NServe in the military during the year? Y/N Expect significant changes in income, expenses or dependents in 2022? Y/NWould you like us to review your Social Security statements? If yes, bring in your benefit statement. Y/N If you took money out of your HSA, was it used for anything non-medical?

#### MINNESOTA K-12 EDUCATION EXPENSES Note: Minnesota allows deductions (or credits) for K-12 school expenses. Please list by child. Child: Child: Type of School (Private, Public, Homeschool) & Grade /Grade /Grade Fees/Tuition for Enrichment outside regular school /Class Type /Class Type /Class Type\_\_\_\_\_ \$ Fees for individual instruction outside school /Class Type **Required School Supplies** \$ \_\_\_\_/Type\_\_\_ /Type Purchase or Rentals of Music Instruments \$ Transportation cost paid to others /Provider /Provider \$ \$ Home Computer Expenses / Private School Tuition

Y/N

Need a return prepared for your dependents? If so, whom:

We submit this information to Jason Anakkala Ltd. only for use in preparing, at our request, federal and/or state income tax returns for 2021. Each item can be substantiated by receipts, cancelled checks or other documents. The information supplied is true, correct and complete to the best of our knowledge. We have reviewed the organizers provided to us and have provided all relevant material needed to properly complete our tax return.

Signed:	Date:	