

# Jason Anakkala Ltd.

Certified Public Accountant & Consultants

1001 Kingwood St #115  
Brainerd, MN 56401

Phone: 218-824-1860 Fax: 866-752-0195  
Email: [jason@jasonacpa.com](mailto:jason@jasonacpa.com)

## 2021 INDIVIDUAL INCOME TAX ORGANIZER

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

- Sole Prop, Rental, Farm, and Business Organizers can be found at our website [www.jasonacpa.com](http://www.jasonacpa.com) •

TAXPAYER INFORMATION	SPOUSE INFORMATION
First _____ M _____ Last _____	First _____ M _____ Last _____
SS # _____ DOB _____	SS # _____ DOB _____
Occupation _____	Occupation _____
Address _____	Address _____
City _____ State _____ Zip _____	City _____ State _____ Zip _____
Home _____ Work _____	Home _____ Work _____
Cell _____ Email _____	Cell _____ Email _____
Are you legally blind or disabled? Y / N	Are you legally blind or disabled? Y / N

DEPENDENTS									
Name	Birthday	SS #	Relation	Months in Home	Grade at 12/31	Daycare Costs	Income Earned	Full Time Student	
									Y / N
									Y / N
									Y / N
									Y / N
									Y / N

DEPENDENT AND CHILD CARE EXPENSES				
For dependents under age 14, or if dependent or spouse is physically or mentally incapable of caring for themselves.				
Name of Provider	Address	SS or Tax ID - Required	Amount Paid	Children Cared For

Are you enrolled in your employer's Flex Plan? Usually, this is the best way to handle child care costs.

THINGS TO BRING	OTHER INCOME NOT ON 1099/W-2																																				
<ul style="list-style-type: none"> <li><input type="checkbox"/> Last Paystub of the Year</li> <li><input type="checkbox"/> W-2 Forms for Wages</li> <li><input type="checkbox"/> 1099-R for Retirement</li> <li><input type="checkbox"/> 1099's for Interest, Dividends, and Other Income</li> <li><input type="checkbox"/> K-1's for Partnerships, Corporations or Estates</li> <li><input type="checkbox"/> 1099-SSA for Social Security Benefits</li> <li><input type="checkbox"/> 1099-SA for Health Savings Accounts</li> <li><input type="checkbox"/> 1095-A for Health Insurance through MNSure or the Marketplace</li> <li><input type="checkbox"/> Voided Check(s) for Direct Deposit</li> <li><input type="checkbox"/> 1098's: Mortgage Interest, Student Loan Interest, College Tuition</li> <li><input type="checkbox"/> Closing Papers for Real Estate purchases &amp; sales, including Refinances</li> <li><input type="checkbox"/> Property Tax Statements</li> <li><input type="checkbox"/> All Other Statements Showing Income</li> <li><input type="checkbox"/> IRA Year-End Statements</li> <li> </li> <li><input type="checkbox"/> NEW CLIENTS ONLY: Last 3 Year's Tax Return</li> <li><input type="checkbox"/> NEW CLIENTS ONLY: Copy of Drivers License(s)</li> </ul>	<table style="width:100%; border-collapse: collapse;"> <tr><td style="text-align: right;">\$</td><td>_____</td></tr> <tr><td style="text-align: right;">\$</td><td>_____</td></tr> <tr><td style="text-align: right;">\$</td><td>_____</td></tr> <tr><td style="text-align: right;">\$</td><td>_____</td></tr> <tr><td style="text-align: right;">\$</td><td>_____</td></tr> <tr><td style="text-align: right;">\$</td><td>_____</td></tr> <tr><td colspan="2" style="text-align: center;"><b>****NEW FOR 2021****</b></td></tr> <tr><td><input type="checkbox"/> Stimulus Payment Notice 1444-C or Letter 6475</td><td style="text-align: right;">\$ _____</td></tr> <tr><td colspan="2" style="text-align: center;">(Rec'd last March/Spring \$1400/person)</td></tr> <tr><td><input type="checkbox"/> IRS Letter 6419 for those that received the advance child tax credit**</td><td style="text-align: right;">\$ _____</td></tr> <tr><td colspan="2"> </td></tr> <tr><td colspan="2" style="text-align: center;"><b>WE MUST HAVE THIS INFORMATION</b></td></tr> <tr><td colspan="2">**for married couples, we need this for both spouses</td></tr> <tr><td colspan="2" style="text-align: center;"><b>NONTAXABLE INCOME</b></td></tr> <tr><td>Veterans Pension/Disability</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Child Support/Assistance</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Worker's Compensation</td><td style="text-align: right;">\$ _____</td></tr> <tr><td>Other (identify)</td><td style="text-align: right;">\$ _____</td></tr> </table>	\$	_____	\$	_____	\$	_____	\$	_____	\$	_____	\$	_____	<b>****NEW FOR 2021****</b>		<input type="checkbox"/> Stimulus Payment Notice 1444-C or Letter 6475	\$ _____	(Rec'd last March/Spring \$1400/person)		<input type="checkbox"/> IRS Letter 6419 for those that received the advance child tax credit**	\$ _____			<b>WE MUST HAVE THIS INFORMATION</b>		**for married couples, we need this for both spouses		<b>NONTAXABLE INCOME</b>		Veterans Pension/Disability	\$ _____	Child Support/Assistance	\$ _____	Worker's Compensation	\$ _____	Other (identify)	\$ _____
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Failure to complete this organizer will jeopardize our ability to prepare an accurate tax return. Please complete!																																					

## ADJUSTMENTS TO INCOME

### RETIREMENT PLANS

	<u>Taxpayer</u>	<u>Spouse</u>
Covered by a retirement plan at work?	Y / N	Y / N
Contributions already made for 2021:		
Traditional (Regular) IRA	\$ _____	\$ _____
Roth IRA	\$ _____	\$ _____
SEP/Simple	\$ _____	\$ _____
Did you convert an IRA to a ROTH IRA?	Y / N	Y / N
Calculate possible retirement plan options with this return? (IRA, Roth, SIMPLE, HSA, etc.)	Y / N	Y / N
<i>2021 IRA Limit: \$6000; age 50 or older \$7000</i>		

### HEALTH SAVINGS ACCOUNTS

Contributions to HSA	\$ _____	\$ _____
Distributions from HSA	\$ _____	\$ _____
<i>2021 HSA Limit: Single \$3600; Family \$7200; over age 54 +\$1000</i>		

### STUDENT LOAN INTEREST/CREDIT

	<u>Taxpayer</u>	<u>Spouse</u>
Student Loan Interest Paid	\$ _____	\$ _____
<i>You also need to provide Form 1098-E.</i>		
Total amount of loan payments made in 2021 (principal + interest)	\$ _____	\$ _____
Original amount of student loans	\$ _____	\$ _____

### MISCELLANEOUS

Educator Expenses (supplies, etc. )	\$ _____	\$ _____
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## ENERGY TAX CREDITS

**Must be on your primary residence.**

Windows, exterior doors, skylights	\$ _____
Storm doors, windows	\$ _____
Furnace and/or air conditioner	\$ _____
Insulation	\$ _____
Water heater	\$ _____
Metal or asphalt roof w/ cooling granules	\$ _____
Geothermal heat pumps	\$ _____
Wind turbines	\$ _____
Solar panels	\$ _____
Fuel cell property	\$ _____

## DEDUCTIONS

### MEDICAL AND DENTAL EXPENSES

*\* Do not include amounts withheld pre-tax from your wages.*

Health Insurance Premiums *	\$ _____
Medicare Premiums	\$ _____
Long Term Care Insurance	\$ _____
Insur Co _____ Policy Number _____	
Vision Insurance Premiums *	\$ _____
Dental Insurance Premiums *	\$ _____
Prescription Medicine / Drugs	\$ _____
Doctors, Dentists, Hospitals	\$ _____
Labs, X-Rays	\$ _____
Eye Glasses, Contact Lens	\$ _____
Hearing Aid, Supplies, Repair	\$ _____
Special Medical Apparatus	\$ _____
Ambulance	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Travel for Medical	_____ Miles
Lodging Away From Home	\$ _____
Number of Nights	_____
HSA or Medical Reimbursements	\$ _____
<i>(If above are gross expenses)</i>	

### REAL ESTATE TAXES (Excluding Special Assessments)

*Provide actual 2021 property tax statements.*

Primary Residence	\$ _____
Second Residence	\$ _____
Land	\$ _____
Property Tax Refund Received in 2021	\$ _____

### VEHICLE LICENSE FEES (Cars & Trucks Only)

<u>Year/Make/Model</u>	<u>Amount</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____

### SALES TAX PAID ON LARGER PURCHASES

<u>New/Used</u>	<u>Description</u>	<u>Amount</u>
_____	_____	\$ _____
_____	_____	\$ _____

## AFTER HIGH SCHOOL EDUCATIONAL EXPENSES

Pay for or incur a loan for college or vocational costs last year? We **must** have the 1098-T and an account activity statement from the school.

	<u>Parent(s)</u>	<u>Dependent 1</u>	<u>Dependent 2</u>	<u>Dependent 3</u>
Year of school	_____	_____	_____	_____
Name of school attended	_____	_____	_____	_____
Tuition/fees	_____	_____	_____	_____
Books and supplies	_____	_____	_____	_____
Expenses paid by parents?	Y / N	Y / N	Y / N	Y / N



## 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.

- Y / N Any births, adoptions, miscarriages, marriages, divorces, deaths or name changes in your immediate family in 2021?
- Y / N Did the taxpayer and spouse live apart for the entire last 6 months of the year or longer?
- Y / N Do you have a mentally or physically disabled child?
- Y / N Any changes in dependents in 2021? If so, please explain: \_\_\_\_\_
- Y / N Can 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 / N Made gifts of more than \$15,000 to any individual? If yes, provide details.
- Y / N Are you receiving a military pension or other military retirement pay?
- Y / N Wish to donate to the MN Non-Game Wildlife Fund? If yes, please indicate amount \$ \_\_\_\_\_.
- Y / N Receive any notices from any tax authorities? If yes, provide copies.
- Y / N Did either you or your spouse turn age 72 this year? Minimum retirement distributions are required. Do you need assistance in calculating the necessary distribution?
- Y / N 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 Rent Paid.
- Y / N Receive/pay alimony or child support during the year? If yes, provide amount paid, name & address of recipient.  
\_\_\_\_\_
- Y / N Receive 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 / N Refinance 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 / N Add someone (or were you added) to the title or deed of a property, such as a life estate?
- Y / N Do you want us to prepare Quarterly tax estimate vouchers for you for 2022?
- Y / N **Any income from or pay taxes to a foreign country, have a foreign account or own property in a foreign country? MUST ANSWER**
- Y / N **Receive, sell, send, exchange, or otherwise dispose of any financial interest in any virtual currency? MUST ANSWER**
- Y / N Pay a household employee over \$1,900?
- Y / N Go through bankruptcy, foreclosure, or repossession proceedings? Considering?
- Y / N Moved during 2021 or have a change of residence or job location during the year?
- Y / N Reside in more than one state during the year?
- Y / N Earn income from a state other than the state in which you live?
- Y / N Receive any disability income during the year?
- Y / N Receive a Schedule K-1 from a partnership, S Corp or trust?
- Y / N Serve in the military during the year?
- Y / N Expect significant changes in income, expenses or dependents in 2022?
- Y / N Would 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?
- Y / N Need a return prepared for your dependents? If so, whom: \_\_\_\_\_

## 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_____
Fees for individual instruction outside school	\$_____/Class Type_____	\$_____/Class Type_____
Required School Supplies	\$_____	\$_____
Purchase or Rentals of Music Instruments	\$_____/Type_____	\$_____/Type_____
Transportation cost paid to others	\$_____/Provider_____	\$_____/Provider_____
Home Computer Expenses / Private School Tuition	\$_____/ \$_____	\$_____/ \$_____

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: \_\_\_\_\_