



New Address: 3365 N Campbell Ave, #121, Tucson, AZ 85719
 tel: (520) 320-1041 fax: (520) 320-1053 email: 1stChoice@1stChoiceTaxServices.com
www.1stChoiceTaxServices.com

2020 Tax Organizer

Call to schedule your Appointment: Day _____ Date _____ Time _____ Preparer _____ or Drop Off Web Portal*
 Due to COVID-19 we also offer virtual appointments via: Phone Internet webcam meeting or Curbside Service

Taxpayer	Spouse
Name _____	Name _____
SSN _____ Birthday _____	SSN _____ Birthday _____
Occupation _____	Occupation _____
e-mail _____	e-mail _____
Cell _____ Daytime _____	Cell _____ Evening _____
Address <input type="checkbox"/> New address this year	<input type="checkbox"/> Yes, Direct Deposit My Refund to:
_____	Bank Name _____ <input type="checkbox"/> Ck <input type="checkbox"/> Sav
City _____ ST _____ Zip _____	Rtn # _____ Acct # _____
Filing Status <input type="checkbox"/> Single <input type="checkbox"/> MFJ <input type="checkbox"/> HOH <input type="checkbox"/> QW <input type="checkbox"/> MFS	I prefer my finished tax return: <input type="checkbox"/> Printed <input type="checkbox"/> PDF <input type="checkbox"/> Both

Did you and/or your spouse purchase health insurance thru the Marketplace (exchange)? Yes No (If YES, 1095-A required)

Did you receive an IRS Economic Impact Payment (COVID/Stimulus Rebate)? Yes No If YES, provide payment details:

Date: _____ \$ _____ Date: _____ \$ _____ Date: _____ \$ _____

DEPENDENTS

Name (First Last) (exactly as shown on SS card)	Soc. Sec. No.	Relationship	#Months in Home	Birthdate	Full Time Student
					<input type="checkbox"/> Y <input type="checkbox"/> N
					<input type="checkbox"/> Y <input type="checkbox"/> N
					<input type="checkbox"/> Y <input type="checkbox"/> N

TAX DOCUMENTS ENCLOSED *

* To send digital documents, use our web portal: login.atomanager.com/atom_1ST	Taxpayer	Spouse
Picture ID (or copy) required for both Taxpayer & Spouse by new industry regulations	<input type="checkbox"/>	<input type="checkbox"/>
Wages W2 <input type="checkbox"/> Employment change this year		
Pensions and IRAs 1099R <input type="checkbox"/> COVID Hardship?		
Social Security 1099SSA		
Interest Income 1099INT		
Dividend Income 1099DIV		
Sales of Capital – 1099B (<input type="checkbox"/> enclose broker statement) <input type="checkbox"/> HUD1 Sale of Real Estate		
Unemployment Compensation (it's taxable) 1099G		
Gambling Winnings W2G (see page 2 for gambling losses)		
<input type="checkbox"/> Estate, <input type="checkbox"/> Trust <input type="checkbox"/> S-Corp <input type="checkbox"/> Partnership <input type="checkbox"/> PTP K-1		
<input type="checkbox"/> Rents, <input type="checkbox"/> Royalties <input type="checkbox"/> Prizes, <input type="checkbox"/> Self Employment – 1099MISC 1099NEC (see page 3)		
Mortgage Interest 1098 (see page 2)		
Education Expense – <input type="checkbox"/> 1098T & <input type="checkbox"/> Proof of Payment Student Loan <input type="checkbox"/> 1098E		
Other 1099s: <input type="checkbox"/> 1099A <input type="checkbox"/> 1099C <input type="checkbox"/> 1099SA <input type="checkbox"/> 1099LTC <input type="checkbox"/> 1099Q <input type="checkbox"/> 1099OID		

New Clients: Please provide: copy of last year's tax return Picture IDs Social Security Cards for all Dependents

(Standard Ded: \$24,800 Married \$18,650 HOH \$12,400 Single)

MEDICAL

Medical Insurance (not Pre-Tax)	
Dental/Vision Ins. (not Pre-Tax)	
LongTerm Care Ins. - Taxpayer	
LongTerm Care Ins. - Spouse	
DR	
DDS	
Rx Meds	
X-Ray, Labs, Hospital	
Eye care & Supplies	
Hearing Aids & Supplies	
Medical or Diabetic Supplies	
Smoking, Weight Loss, Rehab Prog	
Assisted Living/Nursing Home	
(Less Insurance or HSA Reimbursements)	()
Total	
Medical Miles (# miles _____)	

TAXES

AZ Tax Paid	
_____ State Tax Paid	
Real Estate Tax:	
Auto License (VLT)	
Sales Tax paid on Large Purchases	
<input type="checkbox"/> Auto <input type="checkbox"/> Boat <input type="checkbox"/> Airplane <input type="checkbox"/> _____	
Non-taxable income for addl Sales Tax deduction <input type="checkbox"/> Adoption <input type="checkbox"/> Foster <input type="checkbox"/> Child Support <input type="checkbox"/> VA <input type="checkbox"/> _____	

ITEMIZED DEDUCTIONS INTEREST

Home Mortgage <input type="checkbox"/> 1098 <input type="checkbox"/> Over \$750K	
2'nd Home/Motor Home <input type="checkbox"/> 1098	
HELOC <input type="checkbox"/> 1098 <input type="checkbox"/> Acquisition Debt?	
P.M.I. (Private Mortgage Insurance)	
Private Mortgage <input type="checkbox"/> No 1098	
Name _____	
SSN _____	
Address _____	
Points on Refi. <input type="checkbox"/> HUD-1	
Margin Interest <input type="checkbox"/> 1099	
Other Investment Interest	

CHARITABLE CONTRIBUTIONS

New: Even if you do not have enough total deductions to exceed the Standard Deduction amounts listed above, you are now allowed an additional deduction on your IRS and AZ tax return based on your charitable giving. Please list all donations here:

\$ CONTRIBUTIONS \$

Organization Name	\$ Contributed
1)	
2)	
3)	
4)	
5)	
6)	
7)	
8)	
9)	
10)	
Total	

ESTIMATED TAXES PAID

Due	Mailed	IRS	Ariz.	_____
Applied from last yr				
April 15				
June 15				
Sept 15				
Jan 15				
Total				

MISCELLANEOUS

Gambling Losses (<= winnings)	
Casualty Loss <input type="checkbox"/> Fed Disaster Area	
Moving Exp <input type="checkbox"/> Active Duty Military	

\$ AZ "Dollar for Dollar" Tax Credit \$

<input type="checkbox"/> AZ321 Qual Charitable Org-QCO (# _____)*	
<input type="checkbox"/> AZ322 Public/Charter School (# _____)*	
<input type="checkbox"/> AZ323 Private School Tuition Org (# n/a)*	
<input type="checkbox"/> AZ352 Qual Foster Care Org-QFCO (# _____)*	
<input type="checkbox"/> AZ340 Military Family Relief Fund	

(* provide AZ DOR code #, or donation receipt)

NON-CASH CONTRIBUTIONS **

1)	
2)	
3)	
Charity Miles (# Miles _____) Total**	

(** If over \$500 additional detail required)

GAINS & LOSSES FROM SALES OF REAL ESTATE, PERSONAL PROPERTY & COLLECTIBLES

IRS Requires Form 1099B Broker Statements for all sales of Stocks, Bonds, and Mutual Funds

Description	Buy Date	Sell Date	Sale Price	Cost

Provide 1099S and HUD-1 closing documents (both purchase and sale) for any Real Estate transactions

OTHER INFORMATION, INCOME, ADJUSTMENTS or CREDITS

	Taxpayer	Spouse
Did anyone else other than your spouse or dependents live in your home	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Did you have a Foster Child <input type="checkbox"/> Caseworker Placement Letter (required)	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Did you have a Foreign Financial Account or interest in a Foreign Trust	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Did you own/trade/learn any Crypto-Currency <input type="checkbox"/> Exchange Spreadsheet	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Did you receive any notices from the <input type="checkbox"/> IRS or <input type="checkbox"/> AZ DOR <input type="checkbox"/> Copy Attached	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Did you foreclose or abandon any Real Estate <input type="checkbox"/> Primary Res <input type="checkbox"/> Other	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Did you have any debt cancelled or forgiven this year 1099C	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Did you gift more than \$15,000 to any one individual	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Did you install solar or other energy efficient home improvements	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Sharing Economy Income <input type="checkbox"/> Airbnb <input type="checkbox"/> Lyft <input type="checkbox"/> Uber <input type="checkbox"/> Other _____	<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Y <input type="checkbox"/> N
Tips not Reported to Employer	\$ _____	\$ _____
Taxable Grants, Scholarships or Fellowships	\$ _____	\$ _____
Jury Duty payments received	\$ _____	\$ _____
Alimony Received (Alimony does not include child support)	\$ _____	\$ _____
Alimony Paid to: Name _____ SSN _____	\$ _____	\$ _____
Date your Alimony Decree was finalized or last modified:	___/___/___	___/___/___
IRA Deposit <input type="checkbox"/> done by 12/31 <input type="checkbox"/> will do by 4/15 <input type="checkbox"/> advise me	\$ _____	\$ _____
Roth IRA Deposit <input type="checkbox"/> done by 12/31 <input type="checkbox"/> will do by 4/15 <input type="checkbox"/> advise me	\$ _____	\$ _____
SEP Deposit <input type="checkbox"/> done by 12/31 <input type="checkbox"/> will do by 4/15 <input type="checkbox"/> advise me	\$ _____	\$ _____
529 Education Savings Plan Contributions (Deductible for AZ up to \$4,000)	\$ _____	\$ _____
Health Savings Account: <input type="checkbox"/> 5498SA(Contributions) <input type="checkbox"/> 1099SA(Distributions)		
College Tuition & Fees Paid <input type="checkbox"/> 1098T <input type="checkbox"/> Proof of Payment (required)	\$ _____	\$ _____
If paid by Student Loan, who's responsible to repay <input type="checkbox"/> Parent <input type="checkbox"/> Student		
Claimed American Opportunity or Hope Credits before <input type="checkbox"/> Y <input type="checkbox"/> N # years: 1 2 3 4		
Student Loan Interest Paid <input type="checkbox"/> 1098E	\$ _____	\$ _____
<input type="checkbox"/> Adoption Credit <input type="checkbox"/> Special Needs (<input type="checkbox"/> Adoption Order <input type="checkbox"/> Subsidy Agreement)		

DAYCARE EXPENSES

Provider _____ SSN/EIN _____ Amount Pd \$ _____ Address _____ Zip _____ For Dependent(s) _____	Provider _____ SSN/EIN _____ Amount Pd \$ _____ Address _____ Zip _____ For Dependent(s) _____
---	---

OTHER ITEMS or NEXT YEAR CHANGES YOU'D LIKE TO DISCUSS

Thank you for your continued business. We look forward to seeing you soon!