

# KLW ACCOUNTING & TAX LTD.

FULL SERVICE ACCOUNTING,  
TAX & FINANCIAL PLANNING SERVICES

## 2021 TAX ORGANIZER

This tax organizer is designed to help you collect and report the information needed to prepare your 2021 income tax return(s). The attached worksheets cover income, deductions, and credits and will help in the preparation of your tax return(s) by focusing attention on your particular tax situation. If you are a new client this year, your 2020 information will not be available in this organizer as a reference point for 2021.

Please enter your 2021 information in the designated areas on the worksheets. If you need to include additional information, you may use the last page (Detail Worksheet), or add another page.

**Please note: The Miscellaneous Information pages contain important questions relative to the preparation of your return(s), and each one should be answered. If you answer “yes” to any of the questions, please be sure to provide the applicable details.**

Thank you for taking the time to complete this organizer. Please provide the following information or documents:

- \_\_\_ A copy of your 2020 tax return(s) \*
- \_\_\_ Original W-2 forms \*
- \_\_\_ Schedule(s) K-1 from partnerships, S corporations, trusts or estates \*
- \_\_\_ Other forms of compensation (1099-MISC/NEC) or pension distributions (1099-R) \*
- \_\_\_ Form(s) 1099 or statements showing interest and/or dividend income \*
- \_\_\_ Brokerage statements showing transactions for stocks, bonds, mutual funds, etc.
- \_\_\_ Form(s) 1098 reporting interest paid, copies of real estate tax bills, or other real estate-related information and documents
- \_\_\_ Copies of closing statements for the purchase or sale of real estate
- \_\_\_ Any other information or documents you have received, or any items which you may have questions about

***\* disregard if we prepare these tax returns or forms in our office***

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