

Print Name: _____ Date: _____

<p>These questions pertain to calendar year 2020, unless otherwise noted. If married filing jointly, the questions apply to you and your spouse.</p>	<p>Yes</p>	<p>No</p>
<p>1. Did you receive a first or second stimulus? If yes, please provide dollar amounts 1st \$_____ 2nd \$_____.</p>		
<p>2. Did you, your spouse, or dependents have health insurance through the Health Insurance Marketplace? You can purchase health insurance through the Marketplace or even through a broker.</p> <hr/> <p>Did you bring your 2020 1095-A Health Insurance Marketplace Statement? If not, please provide.</p> <hr/>		
<p>3. Did you buy or sell virtual currency in 2020? (such as Bitcoin, Litecoin, Ripple, Ethereum, etc.) A cryptocurrency, broadly defined, is virtual or digital money which takes the form of tokens of "coins".</p>		
<p>4. Did you incur any dependent childcare expenses in 2020? If yes, please provide childcare expense statements.</p>		
<p>5. Did you pay tuition costs for yourself or a family member in 2020 (even if classes were attended in another year)? If yes, you must provide 1098-T and related financial transcripts before tax return can be filed.</p>		
<p>6. Did you trade goods, services, etc. in exchange for other goods, services, etc., rather than for money? i.e. Barter</p>		
<p>7. Did you receive any payments or material from anyone for providing services?</p>		
<p>8. Did you pay or receive alimony? Circle one: Pay or Receive Amount: _____</p>		
<p>9. Do you own any securities (stocks, bonds) or hold any debts that became worthless during 2020?</p>		
<p>10. Did you have any debts canceled or reduced (credit cards, car loans, mortgage debt, etc.), property repossessed or foreclosed upon, or did you file bankruptcy in 2020? If so, please explain _____</p>		
<p>11. Did you (or do you plan to before April 15, 2021) contribute to a traditional IRA or Roth IRA for 2020?</p>		
<p>12. Did you start/have a business or purchase any rental property during 2020?</p>		
<p>13. Did you pay any individual \$2,100 or more to preform household services during 2020, such as a babysitter, caretaker, housekeeper, cook, gardener, etc. ?</p>		
<p>14. Did you receive any income in 2020 not shown on this organizer? If so, list income:</p>		