

PLEASE DOWNLOAD TO YOUR COMPUTER BEFORE FILLING OUT.



The GSM Advisory Group LLC

TAX ORGANIZER

This Tax Organizer is designed to help you to collect and report the information needed to prepare your 2020 income tax return. The organizer covers income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your specific needs.

Please enter your information in the designated areas on the worksheets.

Please provide the following information:

<input type="checkbox"/>	A copy of your past year's tax return (if not in our possession).
<input type="checkbox"/>	Original Form(s) W-2.
<input type="checkbox"/>	Schedule(s) K-1 showing income or loss from partnerships, S Corporations or estates or trusts.
<input type="checkbox"/>	Copies of other compensation or pension documentation, such as Form(s) 1099-MISC or Form(s) 1099-R
<input type="checkbox"/>	Form(s) 1099 or statements reporting dividend and interest income.
<input type="checkbox"/>	Brokerage statements showing transactions for stocks, bonds, etc.
<input type="checkbox"/>	Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
<input type="checkbox"/>	Copies of closing statements regarding the sale or purchase of real property.
<input type="checkbox"/>	All other information notices you received, or any items you have questions about.

Please be sure to provide documentation or applicable details for any questions below for which you answer “yes”.

HEALTH INSURANCE AND EDUCATION				
			YES	NO
1		Did you or your spouse have self-employed health insurance?.....	<input type="checkbox"/>	<input type="checkbox"/>
2		Did you contribute to or receive distributions from a Health Savings Account (HSA)?.....	<input type="checkbox"/>	<input type="checkbox"/>
3		Did you have a college saving account (i.e. 529 Plan, Educational Savings Account).....	<input type="checkbox"/>	<input type="checkbox"/>

DIRECT DEPOSIT OF REFUND AND FOREIGN INCOME				
			YES	NO
1		Did you have any foreign income or a foreign account? Please see the guidelines on page 3 and if so, provide your documentation.....	<input type="checkbox"/>	<input type="checkbox"/>
2		The Internal Revenue Service is able to deposit many refunds directly into taxpayers’ accounts. If you receive a refund, would you like direct deposit? If you answer “yes” fill out 4 a-d below	<input type="checkbox"/>	<input type="checkbox"/>
3		If you owe income taxes, would you like it to be automatically withdrawn from your bank account? If you answer “yes” fill out 4 a-d below	<input type="checkbox"/>	<input type="checkbox"/>

Caution: Review information for accuracy. PLEASE PROVIDE A VOIDED CHECK IF POSSIBLE.

4a Name of your financial institution: _____

4b Routing Transit Number (must begin with 01 through 12 or 21 through 32)..... _____

4c Account Number..... _____

4d What type of account is this?.....Checking Savings