



1040 TAX RETURN INDIVIDUAL TAX ORGANIZER 2021 - EXISTING CLIENT

Name: _____ Date: _____
Email: _____ Phone: _____ Occupation: _____

Were there any changes to your address, marital status, or dependents in 2021? If yes, please provide your new information in the space below.

Details of Spouse/Dependents that lived with you during the year:

Name	Relationship	Date of Birth	U.S. SSN or ITIN	Any income earned in the year? (Y/N)

Please provide the following:

- ✓ Full copy of your Canadian personal tax return (if not prepared by Taylor Leibow) plus all tax slips.
- ✓ Correspondence from the IRS regarding your prior year return.
- ✓ Details of any estimated U.S. tax payments for the 2021 calendar year.

April 15, 2021: _____ (USD) June 15, 2021: _____ (USD)

September 15, 2021: _____ (USD) January 15, 2022: _____ (USD)

- ✓ Amount of the 2nd and 3rd Economic Impact Payment you and your family received in 2021, if any:
Received in January 2021: _____ (USD) Received in or after March 2021: _____ (USD)
- ✓ Did you receive any funds from the Advanced Child Tax Credit between July and December of 2021? Yes No (If yes, please provide a copy of Letter 6419).

During the year, did you incur the following expenses? (If so, provide the dollar amount and note the currency)

- US Property Taxes for Real Estate Located in the US _____ (USD)
- Medical Expenses _____
- Charitable Donations to Canadian Charity _____ (CDN)
- Charitable Donations to US Charity _____ (USD)

Please answer YES or NO to the following questions and **provide details** if you answer Yes.

1. If you are a teacher or other educator, provide details on any unreimbursed expenses for personal protective equipment and other supplies used for COVID-19 measures. Yes No

2. Were you self-employed during the year and due to COVID-19 were you unable to work for reasons related to your own health or to care for a family member? Yes No



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3. With respect to any U.S. Individual Retirement Arrangement (“IRA”) or 401(k) accounts, did you make any contributions, rollovers, or withdrawals during the year? Yes No

4. Do you have a 529 college savings plan or are you the beneficiary of a 529 college savings plan? Yes No

5. Do you have a U.S. Roth IRA? Yes No

6. Do you have a U.S. revocable living trust? Yes No

7. Did you sell any assets (stocks, bonds, real estate, etc.) during the year? If yes, provide the cost of the initial purchase, the date of purchase, the sale proceeds, and the date of sale. Yes No

8. Do you, or any immediate family member, have any investments in a company not listed on a stock exchange? Yes No

9. Did you own any mutual funds during the year in an investment account outside your RRSP, RRIF or LIRA? Yes No

10. At any time during the year, did you own or control, 10% or more of a Corporation, Trust, or Partnership? Yes No

11. Were you an officer or director of a corporation during the year? Yes No

12. Do you have an interest in a trust or an estate? Yes No

13. During the year, were you the owner or beneficiary of a Registered Disability Savings Plan (RDSP), Registered Education Savings Plan (RESP), or Tax Free Savings Account (TFSA)? Yes No

If yes, please provide the annual statement for each RDSP/RESP/TFSA showing the amount and type of income earned during the year, the contributions, the withdrawals and the December 31st balance.

14. Do you receive US Social Security? Yes No

If yes, did you start receiving benefits on or before January 1, 1996? Yes No

15. During the year, did you gift property (cash, investments or real estate etc.) in excess of \$15,000 USD to any person? Yes No

16. Were you the owner of, or did you have signature authority over any bank account, securities or other financial account (including RRSPs and RRIFs) located outside of the US at any time in the year? Yes No

If yes, was the aggregate value at any time in the year more than \$10,000 USD?



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If yes, please complete the FBAR summary enclosed. An electronic version of the form is available at www.taylorleibow.com/us-tax-services

17. Do you have a life insurance policy with a cash surrender value? Yes No

If yes, please provide a December statement showing the current value.

18. Do you have a pension plan or deferred compensation arrangement (does not include CPP, OAS, US Social Security)? Yes No

If yes, please provide the current value of the plan if available.

19. At any time during the year, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No

20. At any time during the year, did you receive gambling winnings or incur gambling losses? This includes, but is not limited to, winnings from lotteries, raffles, horse races and casinos. Yes No

21. At any time during the year, did you receive more than \$100,000 USD as a gift or bequest from a non-U.S. person or a foreign estate (non-U.S. estate)? Yes No

If you have not answered all questions & supplied all documents requested on this organizer, please explain, otherwise your tax return may be delayed and/or additional fees may be incurred because of the extra time required. Also, please provide below any additional notes to assist us in preparing your return.

The information disclosed above is accurate and complete to the best of my knowledge.

Signature

Date