



**2020 Tax Organizer  
For Individuals**

**Phone: 850-995-5000**

**Fax: 850-994-4522**

**Email: [staff@durstjordan.com](mailto:staff@durstjordan.com)**

**Please contact our office if you would like a full comparative organizer emailed to you.**

**Feel free to drop off your tax forms, documents and completed organizer during office hours. You do not need an appointment to drop off documents listed within this organizer.**

**If you would like to schedule an appointment with one of our CPAs, please call the office.**

**COVID-19 Updates:**

**If you have a concern about an in-person appointment, we have virtual appointments, phone conferences and secure email capabilities.**

**Durst Jordan, CPA, PA  
2020 Tax Organizer**

<b>Sources of Income (Please provide supporting forms)</b>	<b>Check if Applicable (✓)</b>
<i>Please provide a copy of your driver's license or other IRS approved identification. This applies to both the taxpayer and spouse.</i>	
<i>Our staff will ask you to confirm your banking information whether or not you are expecting a refund.</i>	
Forms W-2	
Forms 1099	
Retirement Plan Distributions	
Social Security or Other Benefits	
K-1 Income from Partnerships, Corporations or LLC's	
Form 1095-A (This is required if you receive any insurance other than from your employer.)	
Recovery Rebate Credit (Please turn in a copy of the letter you received showing with the amount of your stimulus check.)	
<b>Deductions (Please provide supporting forms, if applicable)</b>	
Child and Dependent Care Provider Expenses (You must have their Federal Identification Number)	
Education Tuition and Fees/Books, Supplies, Etc. (For college students please notate how many years completed and supply their Form 1098-T)	
Student Loan Interest Paid	
Medical and Dental Expenses	
Real Estate Taxes	
Home Mortgage Interest Paid	
Charitable Contributions (As a result of the CARES Act, you can claim charitable cash contributions of up to \$300 even if you are unable to itemize.)	
Other (Please Describe)	

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Specific Tax Areas	Answer Yes or No
Do you own rental properties? <b>If so, please contact our office for a rental organizer.</b>	
Do you own a farm?	
Did your marital status or dependents change in 2020?	
Did you buy/sell/finance a principal residence or other properties?	
Did you incur any casualty or theft losses attributable to a federally declared disaster?	
Did you buy/sell any stocks or bonds? If yes, please provide dates and amounts:	
Did you receive, sell, send, exchange or otherwise acquire any virtual currency?	
Did you purchase a new vehicle in 2020 and pay the sales tax in 2020?	
Are you an educator?	
Are you a member of a partnership, LLC, or other corporation?	
Did you in make an early withdrawal from a retirement account? If so, please discuss with your preparer and include your Form 1099-R and any other supporting documents.	
Did you in 2020 make any qualified charitable contributions directly from an IRA?	
Did you make residential energy improvements? Such as solar water heaters or solar panels.	
Did you make any estimated tax payments? If so, how much and when?	
Did you receive any income or incur any expense not included in this organizer? If yes, please describe:	