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2020 TAX DEDUCTION FINDER & PROBLEM SOLVER

This is an archive of the 2020 edition of our tax organizer. Use this organizer if you have not yet filed your 2019 tax return.

To get ready for your tax appointment, we use tax organizers to help us identify missing tax deductions and get you more organized before your appointment. We update the tax organizer annually to make sure you are compliant with the latest tax law changes.

The 2020 individual tax organizer is provided in three configurations to assist you in collecting relevant tax information needed to properly prepare your tax return. Access any of the three versions by double-clicking on the underlined title links below. The organizers can be downloaded to your computer where you can fill and save the information until you have completed collecting all of your information. After you have completed it, please forward the organizer (printed or digitally) to our office for immediate service. If you have an office appointment, you can print it out and bring it with you to the meeting. **A word of caution:** you can fill the organizers online and print them out. However, if you close the file, your data will not be saved unless the form is saved to your computer.

Once the completed organizer has been received, you will be contacted by phone, fax or e-mail with any questions, comments, or suggestions. If you e-mail our office advising us that you have sent your tax materials, we will notify you of their receipt.

[2020 Basic Organizer](#) – This organizer is suitable for clients that are not itemizing their deductions and DO NOT have rental property or self-employment expenses.

[2020 Basic Organizer plus Itemized Deductions](#) – This organizer is suitable for clients that are itemizing their deductions and DO NOT have rental property or self-employment expenses.

[2020 Full Organizer](#) – This organizer includes the information included in the basic organizer, plus entries for itemized deductions, rental properties and self-employment expenses.

[2020 Business Organizer](#) – Use this organizer for partnerships and incorporated business entities.

[2019 Prior Year Individual Organizer](#) – If you are filing your 2019 return late, please use this organizer.