

RSR Financial Resources, Inc.

Tax, Finance & Mortgage Consulting

Mailing: 13465 Stoney Brook Drive, Reno, Nevada 89511

Phone: (775)-851-7900 ***Fax:*** (775)-851-7966

Web Site: www.rsrfinancial.com

Email: rick@rsrfinancial.com

Tax Organizer Overview

*The following pages contain your **Tax Organizer for 2021** tax returns. Completing your Organizer will help us prepare your return more efficiently. Use your previous tax return along with the schedules in the Organizer to look for information you normally report to improve your thoroughness with what you will report this year. See if you can find last year's Organizer as it will help remind you of income and deductions that you reported last year.*

The Organizer contains several sections/worksheets that include common expenses and deductions that many taxpayers overlook. It has also been updated to reflect the changes in the recent tax law changes. Please review everything thoroughly as each \$100 of deductible expense you find in your records may save you up to \$35 in federal and state income taxes. Enter all relevant information in the designated areas on each page. If you need to include additional information, or ask additional questions, use the back of a page or attach additional pages.

*Be sure you have any of the following forms included with your organizer as I must match the figures on them when your return is prepared. These documents are also listed on the **Source Documents List**, and they include but are not limited to the following:*

- *Copy of last year's tax return (if not in our possession)*
- *Copies of all Form (s) W-2*
- *Copies of Schedule (s) K-1 from partnerships, S-corporations, estates or trusts*
- *Copies of all Form (s) 1099 or statements reporting dividend, interest, retirement or other income*
- *Copies of all Forms (s) 1099-SA or 1099-Q reporting Health Savings or Education Savings activity*
- *Copies of all Form (s) 1098 and copies of real estate tax bills, etc.*
- *Legal/Title/Escrow documents (HUD-1) pertaining to the close of sale or purchase of real property.*

Please call if we can be of any further assistance to you.

Sincerely,

Rick Romero, RSR Financial Resources, Inc.
