



**ROBERT VAN CLEAVE, CPA, CHARTERED**

6800 College Blvd Ste 230  
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<http://www.vancleavecpa.com>  
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Now that we are now in 2021, many of us are starting to dread taxes again. The deadline this year is April 15th unless the IRS decides to extend the deadline like they did last year.

I have just implemented a new website and client portal at <http://www.vancleavecpa.com>. There's not much content on the portal yet; however, clients can click here to schedule an appointment on the website.

The client portal is the preferred way to upload and download documents containing personal and private information such as social security numbers, driver's license numbers, and other private information. The client portal is encrypted via the Secure Socket Layer (SSL), which uses 256-bit encryption. Also, the portal can be used to send encrypted messages, which would be handy if you need to provide me with private information.

My client portal now has a smartphone app that works both on iOS (Apple iPhone/iPad) and Android. The app allows clients to take pictures of their tax documents with their smartphone and upload them to the client portal. Clients can also log into the portal and complete the tax organizer/questionnaire online. Any client wanting access to the portal can email me at [bob@vancleavecpa.com](mailto:bob@vancleavecpa.com).

Clients are still welcome to complete the enclosed tax organizer. Once completed, the client can either bring it to my office or upload it. Other accommodations can also be made.

Another feature I'm introducing this year is digital signatures. Digital signatures are a convenient way to sign your tax returns. If you choose this option, you will be asked questions about you to verify your identity (an IRS requirement for e-signatures).

I am available to meet if necessary. We will try to take as many COVID-19 precautions as possible to get your tax returns filed in a timely manner.

During the month of January, most people will be receiving various "tax information enclosed" letters in the mail. The best advice I can give clients is to obtain a large envelope and place tax documents in the envelope as they arrive in the mail. Once all of your tax forms have arrived, we can proceed with preparing your tax return. Just to make sure you don't accidentally throw this envelope away while doing spring cleaning, you should write "Taxes" on the envelope so you don't mistake it for junk mail.

I hope to hear from you soon!

Sincerely,

Bob Van Cleave, CPA



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**QUESTIONNAIRE/TAX ORGANIZER  
FOR 2020 INDIVIDUAL TAX FILINGS**

	You	Spouse
Name		
Date of Birth		
Driver's license state and number		
Driver's license issue date		
Driver's license Expiration date		
Social Security Number		
Occupation		
Blind	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

What states did you and your spouse live in during 2020?	You	Spouse
Kansas	<input type="checkbox"/>	<input type="checkbox"/>
Missouri	<input type="checkbox"/>	<input type="checkbox"/>
Any others?	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Do you want \$3.00 of your tax liability to go to the Presidential election campaign fund?

You: Yes No

Spouse: Yes No

This fund helps pay for Presidential election campaigns. The fund reduces candidates' dependence on large contributions from individuals and groups and places candidates on an equal financial footing in the general election. The fund also helps pay for pediatric medical research. If you want \$3 to go to this fund, check the box. If you are filing a joint return, your spouse also can have \$3 go to the fund. **If you check Yes, your taxes owed or refund won't change.**





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<b>In 2020, did you and/or your spouse own or were a beneficiary of:</b>	<b>Yes</b>	<b>No</b>
Any interests in a partnership, S-corporation, and/or trust? (Attach K-1)	<input type="checkbox"/>	<input type="checkbox"/>
A business, rental property, other investment property, any royalty contracts?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Any foreign or off-shore bank accounts or other investments? (Think twice – penalty is steep for failing to disclose any such accounts or investments)</b>	<input type="checkbox"/>	<input type="checkbox"/>
Any other investments?	<input type="checkbox"/>	<input type="checkbox"/>

<b>In 2020, were you and/or your spouse:</b>	<b>Yes</b>	<b>No</b>
An educator and incurred educator expenses?	<input type="checkbox"/>	<input type="checkbox"/>
Active duty military and incurred moving expenses?	<input type="checkbox"/>	<input type="checkbox"/>
A member of the national guard or military reservist and traveled more than 100 miles from home to perform duties?	<input type="checkbox"/>	<input type="checkbox"/>
A performing artist or professional athlete?	<input type="checkbox"/>	<input type="checkbox"/>
A fee-based state or local government official?	<input type="checkbox"/>	<input type="checkbox"/>
A member of the clergy?	<input type="checkbox"/>	<input type="checkbox"/>



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<b>In 2020, did you and/or your spouse received:</b>	<b>Yes</b>	<b>No</b>
Alimony?	<input type="checkbox"/>	<input type="checkbox"/>
Unemployment compensation? (provide 1099-G)	<input type="checkbox"/>	<input type="checkbox"/>
State income tax refund? (provide 1099-G if received)	<input type="checkbox"/>	<input type="checkbox"/>
Prizes and gambling winnings?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Overseas, offshore, and/or foreign income?</b>	<input type="checkbox"/>	<input type="checkbox"/>
Scholarships?	<input type="checkbox"/>	<input type="checkbox"/>

<b>In 2020, did you and/or spouse buy or sell:</b>	<b>Yes</b>	<b>No</b>
Your primary residence? (need closing statement)	<input type="checkbox"/>	<input type="checkbox"/>
Any other residences (need closing statement)	<input type="checkbox"/>	<input type="checkbox"/>
Stocks, bonds, mutual funds? (provide 1099-B)	<input type="checkbox"/>	<input type="checkbox"/>
Options, futures, and/or currency?	<input type="checkbox"/>	<input type="checkbox"/>
BitCoin or other cryptocurrency?	<input type="checkbox"/>	<input type="checkbox"/>
Any other investment property or investments?	<input type="checkbox"/>	<input type="checkbox"/>
An energy efficient vehicle?	<input type="checkbox"/>	<input type="checkbox"/>

<b>In 2020, did you and/or spouse pay:</b>	<b>Yes</b>	<b>No</b>
College tuition? (provide 1098-T)	<input type="checkbox"/>	<input type="checkbox"/>
Private school tuition?	<input type="checkbox"/>	<input type="checkbox"/>
Student loan interest?	<input type="checkbox"/>	<input type="checkbox"/>
Educator expenses?	<input type="checkbox"/>	<input type="checkbox"/>
Health insurance and/or disability insurance premiums?	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage interest?	<input type="checkbox"/>	<input type="checkbox"/>



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In 2020, did you and/or your spouse:	Yes	No
Receive social security payments/benefits?	<input type="checkbox"/>	<input type="checkbox"/>
Move?	<input type="checkbox"/>	<input type="checkbox"/>
Get divorced?	<input type="checkbox"/>	<input type="checkbox"/>
Enroll your children in private school?	<input type="checkbox"/>	<input type="checkbox"/>
Contribute to a charitable organization?	<input type="checkbox"/>	<input type="checkbox"/>
Rollover any funds from one retirement account to another?	<input type="checkbox"/>	<input type="checkbox"/>

Did you or your spouse make any estimated tax payments?				
Federal		State		
Date	Amount	State	Date	Amount

Do you and/or spouse have a financial advisor/planner?      Yes    No

Advisor's Name: \_\_\_\_\_

Advisor's Firm: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Our website has a portal that our clients can log into and upload/download forms and completed returns. If you would like access to the portal, provide an email address that we can notify you at when your access has been setup.

\_\_\_\_\_



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## Dependents

If you do not have any dependents, you may skip this page. Otherwise, list your children and anyone else you are supporting:

Name	Date of Birth	Social Security Number	Relationship

Please answer the following questions to make sure you are eligible for the Child Tax Credit and Earned Income Credit:		Yes	No
		<input type="checkbox"/>	<input type="checkbox"/>
Are both you and your spouse parents of the children?		<input type="checkbox"/>	<input type="checkbox"/>
Have you paid more than half of the dependent's support?		<input type="checkbox"/>	<input type="checkbox"/>
Have the dependents lived with you for more than half the year (at least 184 days)?		<input type="checkbox"/>	<input type="checkbox"/>
Has the IRS ever denied or reduced the child tax credit or earned income credit in a previous year?		<input type="checkbox"/>	<input type="checkbox"/>
If requested by the IRS, what documentation can you provide that shows evidence of the relationship between you and each dependent listed?	<input type="checkbox"/> Birth Certificate <input type="checkbox"/> School records/statement <input type="checkbox"/> Medical records <input type="checkbox"/> Healthcare insurance statement <input type="checkbox"/> Landlord/property management statement <input type="checkbox"/> Childcare provider statement <input type="checkbox"/> Social service or placement agency statement <input type="checkbox"/> Indian tribal official statement <input type="checkbox"/> Other: _____		
	<input type="checkbox"/> School records/statement <input type="checkbox"/> Medical records <input type="checkbox"/> Healthcare insurance statement <input type="checkbox"/> Landlord/property management statement <input type="checkbox"/> Childcare provider statement <input type="checkbox"/> Social service or placement agency statement <input type="checkbox"/> Indian tribal official statement <input type="checkbox"/> Other: _____		
If requested by the IRS, what documentation can you provide that shows evidence that each of your dependents lived with you?	<input type="checkbox"/> School records/statement <input type="checkbox"/> Medical records <input type="checkbox"/> Healthcare insurance statement <input type="checkbox"/> Landlord/property management statement <input type="checkbox"/> Childcare provider statement <input type="checkbox"/> Social service or placement agency statement <input type="checkbox"/> Indian tribal official statement <input type="checkbox"/> Other: _____		



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## Small Business

Please complete the next three pages for each of your businesses.

<b>Business Name</b>	
<b>EIN (if any)</b>	
<b>Address</b>	
<b>Owner</b>	<input type="checkbox"/> You <input type="checkbox"/> Spouse
<b>Year business started</b>	
<b>Accounting Method</b>	<input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other

<b>In 2020, did the owner:</b>	<b>Yes</b>	<b>No</b>
Participate in the business for more than 100 hours?	<input type="checkbox"/>	<input type="checkbox"/>
Participate in the business for more than 500 hours?	<input type="checkbox"/>	<input type="checkbox"/>
Have any employees?	<input type="checkbox"/>	<input type="checkbox"/>
Pay any contractors or other vendors a total of \$600 or more in 2020 for services rendered? If yes, does the owner request Robert Van Cleave, CPA to issue any required 1099s to them on your behalf?	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

**INVENTORY** – Enter the amount of beginning and ending inventory for sale and total 2020 purchases, materials, and labor to produce inventory for sale.

Beginning Inventory	\$
Ending Inventory	\$
Total purchases (excluding purchases converted to personal use) in 2020	
Labor costs	
Materials and supplies	
Other costs	
Method to value closing inventory	<input type="checkbox"/> Cost <input type="checkbox"/> Lower of cost or market <input type="checkbox"/> Other
Did you change any inventory valuation methods during 2020 (including LIFO and FIFO)?	<input type="checkbox"/> Yes <input type="checkbox"/> No

**BUSINESS USE OF YOUR PERSONAL VEHICLES** – If you used your personal vehicle in your business and kept a mileage log, you may be able to deduct the use of it.





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	Vehicle #1	Vehicle #2
Year, make, model		
Date vehicle first used in business		
Total miles driven		
Total miles driven for business		
Total miles commuting		
Fuel costs		
Maintenance and repair expenses		
Insurance costs		
Do you own any other vehicles available for personal use?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

**HOME OFFICE** – Complete this section if you had a home office that you used **exclusively** for your business.

Square footage of home office	Amount
Total square footage of home	\$
Rent	
Mortgage interest	Attach Form 1098
Total real estate taxes	
Homeowners insurance	
Repairs and maintenance	
Utilities (electricity, natural gas, propane gas)	
Homeowners association dues	





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## Rental Property

Please complete the next three pages for each of your rental properties.

<b>Property Address</b>	
<b>Owner</b>	<input type="checkbox"/> You <input type="checkbox"/> Spouse
<b>Type of Property</b>	<input type="checkbox"/> Single Family <input type="checkbox"/> Vacation/short-term <input type="checkbox"/> Land <input type="checkbox"/> Other <input type="checkbox"/> Multi-family <input type="checkbox"/> Commercial <input type="checkbox"/> Self-rental
<b>Days rented</b>	
<b>Personal use days</b>	

	Yes	No
In 2020, did the owner pay any contractors or other vendors a total of \$600 or more in 2020 for services rendered? If yes, does the owner request Robert Van Cleave, CPA to issue any required 1099s to them on your behalf?	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

**USE OF YOUR PERSONAL VEHICLES FOR RENTAL ACTIVITIES** – If you used your personal vehicle for your rental activities and kept a mileage log, you may be able to deduct the use of it.

	Vehicle #1	Vehicle #2
Year, make, model		
Date vehicle first used in business		
Total miles driven		
Total miles driven for rental activities		
Do you own any other vehicles available for personal use?	<input type="checkbox"/> Yes <input type="checkbox"/> No	





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Client Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you must contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we may ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return CAREFULLY before signing to make sure the information is correct.
- Fees MUST be paid before your tax return is filed on your behalf. If you terminate the engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of late returns.
- You should keep a copy of your return and any related tax documents in the client portal. You may be assessed a fee if you request a physical copy at the time of completion or in the future.

By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. This includes the information you have provided on this organizer and the information provided on your Individual Tax Engagement Letter.

Taxpayer \_\_\_\_\_

Date: \_\_\_\_\_

Spouse \_\_\_\_\_

Date: \_\_\_\_\_