

2020 Questionnaire

Please check the appropriate box and include all necessary details and documentation.

Yes No

Personal Information

- Did your marital status change during the year? **If yes, explain:** _____
- Did your address change from last year? _____
- Can you be claimed as a dependent by another taxpayer?
- Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that we used for your 2019 return? **If so, please provide a copy of a check.**
- Did you or any dependent receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? **If so, attach the IRS letter.**

COVID-19 Information

- Did you receive the first Economic Impact Payment (EIP) in 2020 as reported on Notice 1444? If yes, how much did you receive?
- Did you receive the second Economic Impact Payment (EIP) in December 2020 or January 2021? If yes, how much did you receive?
- Did you receive a Paycheck Protection Program (PPP) loan?
- If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness?
- Did you receive emergency leave sick pay?
- Did you receive emergency family leave wages?
- Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year?
- If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you needed?
- If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to your son or daughter under the age of 18?
- If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to another?
- If you are self-employed, would you like to defer payment of eligible SECA tax, half each until December 2021 and December 2022?

Dependent Information

- Were there any changes in dependents from the prior year? **If yes, explain:** _____
- Do you have any children under age 19 or a full-time student under age 24 with total investment income in excess of \$2,200? **If so, provide income information.**
- Do you have dependents who must file a tax return? **If so, please provide a copy of their filed return.**

Yes No

- Did you provide over half the support for any other person(s) other than your dependent children during the year? **If so, please provide details.**
- Did you pay for child care while you worked, looked for work, or while a full-time student? **If so, include provider details and expenses paid.**
- Did you pay any expenses related to the adoption of a child during the year? **If so, please provide a list of expenses.**

Business Information

- Did you start a new business or farm, or purchase rental or royalty property this year?
- Did you acquire a new or additional interest in a partnership or S corporation?
- Did you sell an existing business, rental or other property this year? **If yes, please provide documents.**
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any personal assets to business use?
- Did you pay health insurance premiums for your employees this year?
- Did you use your car for business (other than to and from work)? **If yes, complete and sign the auto vehicle information sheet.**
- Was your home rented out or used for business? **If so, please provide details.**
- Did you make any payments in 2020 in the course of a trade or business which would require you to file Form(s) 1099?
- If you checked **yes** above, did you or will you file ALL required Form(s) 1099?

Investment Information

- Did you buy or sell any stocks, bonds or other investment property in 2020?
- Did you exercise any stock options or sell any related stock?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? **If so, please provide settlement statements.**
- Did you have any debts cancelled or forgiven this year, such as a home mortgage or student loan(s)? **If so, provide Form 1099-C.**
- Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? **If so, please provide receipts and certificate.**
- Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal, or fuel cell property or improvements? **If so, please provide receipts and certificate.**

Income Information

- Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?
- Did you receive any unemployment benefits during the year? **If so, provide Form 1099-G.**

Yes No

- Did you receive any other miscellaneous income, such as tips, commissions, jury duty, social security benefits, disability income, prizes, hobby income or gambling winnings? **If so, please provide documentation including gambling deficits.**
- Did you receive any income considered to be nonemployee compensation?
- Do you expect a large fluctuation in income, deductions, or withholding next year? **If so, please explain.**
- Do you have **any** activity involving virtual currency, including holding as an investment?

Retirement Information

- Did you make any withdrawals/receive a distribution from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
- If yes, were any withdrawals due to a Federally declared disaster or COVID-19?
- If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2020?
- Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan outside of your employer employment plan?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?
- Did you transfer or rollover any amount from one retirement plan to another?
- Do you wish to make a contribution to an IRA or retirement plan if eligible?

Education Information

- Did you, your spouse, or dependent incur any educational expenses during the year that are required to attend a college, university or vocational school? **If so, include all Form(s) 1098-T and receipts/lists for qualified tuition and related expenses.**
- Did you make any withdrawals from an education savings or 529 Plan account? **If so, include all Form 1099-Q(s).**
- Did you pay any student loan interest this year? **If so, provide Form 1098-E.**

Health Care Information

- Did you receive any Health Coverage Tax Credit (HCTC) advance payments? **If yes, attach any Forms(s) 1099-H you received.**
- Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? **If yes, attach any Form(s) 1095-A you received.**
- Did you make any contributions to or receive any distributions from a Health savings account (HSA) or Archer MSA? **If yes, include Form 1099-SA.**
- If yes, were all distributions for qualified medical expenses?
- Did you pay long-term care premiums for yourself or your family?
- Did you make any contributions to or receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? **If yes, provide Form 1099-QA.**

Yes No

Itemized Deduction Information

- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Did you pay real estate taxes for your primary home and/or second home?
- Did you pay sales tax on motor vehicle, aircraft, boat or home remodel during the year? **If so, please attach receipts showing sales tax paid.**
- Did you pay any mortgage interest on an existing home loan? **If so, attach any Form(s) 1098 you received.**
- Did you incur interest expenses associated with any investment accounts you held?
- Did you incur a casualty or theft loss or any condemnation awards during the year?
- Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? **If so, please provide details and receipts from the charity to substantiate all contributions made.**
- Were all non-cash charitable contributions in good condition or better?
- Did you donate a vehicle or boat during the year? **If so, attach Form 1098-C or other written acknowledgment from the donee organization.**

Miscellaneous Information

- Did you incur any expenses working as a teacher, counselor, or principal for classes kindergarten through grade 12? **If so, how much (up to \$250)?**
- Did you or your spouse make gifts of more than \$15,000 to any individual?
- Did you engage in any bartering transactions?
- Did you retire or change jobs this year?
- Did you pay any individual as a household employee during the year?
- Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
- Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?
- Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?
- Did you receive correspondence from the State or the IRS? **If yes, explain: _____**
- Did you make any estimated tax payments for 2020? **If yes, please provide dates and amounts of estimated tax payments.**
- If you have an overpayment of 2020 taxes, do you want the excess applied to your 2021 estimated tax (instead of being refunded)?
- If you have a refund due, do you want it directly deposited into your bank account?
- If you owe with your return, would you like it automatically drafted from your bank account?

Yes No

- Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.
- Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- May the IRS discuss your tax return with your preparer?
- Would you prefer to receive your 2021 organizer through your secure portal instead of by mail?
- Would you like to receive a paper copy of your tax return in addition to the electronic copy?

If you marked "yes" on any of the questions, please provide requested documentation.

Please sign here: _____ Date: _____

Print Name _____

Preferred email: _____

Preferred phone: _____ home/cell/work (circle one)

Please list any items not addressed above which may be important to your tax return, as well as any matters you would like to discuss.