

2020 Questionnaire

All questions pertain to activity during the year ended 12/31/2020 unless otherwise noted

Taxpayer:		Spouse:	
Name	_____	Name	_____
Occupation	_____	Occupation	_____
Email	_____	Email	_____
Cell Phone #	_____	Cell Phone #	_____
Home Phone #	_____ (circle preferred phone # and contact person)		
Bank Name	_____	Routing #	_____
		Account #	_____

What format do you prefer for your copy of the 2020 tax return? (check all that apply)

PDF via Portal

Paper Copy (by appt. only)

Paper Copy by mail (\$10 fee)

Would you like a virtual pick up meeting to review your tax return?

Yes

No

If not receiving paper copy of return:

I will pick up original documents (by appointment only)

Mail original documents to me (\$10 fee)

Discard my documents

Personal Information

	Yes	No
Would you like for any tax refund to be directly deposited into a bank account?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like any taxes owed to be directly withdrawn from your bank account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any estimated tax payments towards your 2020 tax liability (outside of payroll or retirement withholding)? If yes, provide detail.	<input type="checkbox"/>	<input type="checkbox"/>
Did your marital status change during the year? If yes, explain: _____	<input type="checkbox"/>	<input type="checkbox"/>
Did your address change from last year? If yes, new address: _____	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your dependents receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter.	<input type="checkbox"/>	<input type="checkbox"/>
Did you reside in or operate a business in a Federally declared disaster area?	<input type="checkbox"/>	<input type="checkbox"/>

Dependent Information

Were there any changes in dependents from the prior year? If yes, explain: _____	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any children under age 19 or a full-time student under age 24 with investment income in excess of \$2,200?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have dependents who must file a tax return?	<input type="checkbox"/>	<input type="checkbox"/>
Did you provide over half the support for any person(s) other than your dependent children during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for child care while you worked, looked for work, or while a full-time student?	<input type="checkbox"/>	<input type="checkbox"/>

Self-Employed Information (Self-Employed Individuals Only)

Do you have a home office used regularly and exclusively for business?	<input type="checkbox"/>	<input type="checkbox"/>
Have you provided total business mileage for 2020?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for health insurance premiums while self-employed?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a Paycheck Protection Program (PPP) loan? If yes, did you apply for PPP loan forgiveness?	<input type="checkbox"/>	<input type="checkbox"/>

Purchases, Sales and Debt Information

Did you start a new business or purchase rental property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange, or purchase any assets used in your trade or business?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire a new or additional interest in a partnership or S corporation?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase or sell a principal residence during the year?	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
Did you sell, exchange, or purchase any other real estate during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you foreclose or abandon a principal residence or real property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire or dispose of any stock during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take out a home equity loan this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you refinance a principal residence or second home this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you lend money with the understanding of repayment and this year it became totally uncollectable? If yes, please provide loan documentation and evidence of efforts to collect.	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any debts canceled or forgiven this year, such as a home mortgage, credit cards, or student loan(s)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a qualified plug-in electric drive vehicle this year?	<input type="checkbox"/>	<input type="checkbox"/>

Income Information

At any time during 2020, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currencies (including from an airdrop or a hard fork) or use virtual currencies to pay for goods or services?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any payments for property sold prior to this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any disability income during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay or receive alimony payments, if the agreement was effective prior to 12/31/2017? If yes, date of divorce: _____	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any unemployment benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did any of your life insurance policies mature, or did you surrender any policies?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any income considered to be nonemployee compensation?	<input type="checkbox"/>	<input type="checkbox"/>
Do you expect a large fluctuation in income, deductions, or withholding next year?	<input type="checkbox"/>	<input type="checkbox"/>

Retirement Information

Did you receive any Social Security benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an IRA, Roth, SIMPLE, SEP, 401(k), or other qualified retirement plan(s)?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, were any withdrawals due to a Federally declared disaster or COVID-19?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions, outside of your payroll, to an IRA, Roth, SIMPLE, SEP, 401(k), or other qualified retirement plan(s)? (Circle all that apply)	<input type="checkbox"/>	<input type="checkbox"/>
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2020?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to put money into a traditional IRA before April 15th to save on taxes?	<input type="checkbox"/>	<input type="checkbox"/>

Education Information

Did you, your spouse, or your dependents attend a post-secondary school?		
If yes, provide Form(s) 1098-T and qualified expense receipts.	<input type="checkbox"/>	<input type="checkbox"/>
Did anyone in your family receive a scholarship of any kind during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from or contributions to an education savings or 529 Plan account?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any student loan interest this year? If yes, provide any Form(s) 1098-E.	<input type="checkbox"/>	<input type="checkbox"/>
Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?	<input type="checkbox"/>	<input type="checkbox"/>

Health Care Information

	Yes	No
Did you enroll for Marketplace Coverage through healthcare.gov under the Affordable Care Act (a/k/a ObamaCare, Marketplace, ACA)? If yes, provide all 1095-A(s)	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to a Health savings account (HSA) or Archer MSA?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year? If yes, provide 1099-SA	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay long-term care premiums for yourself or your family?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to or receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 5498-QA or 1099-QA you received.	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any Health Coverage Tax Credit (HCTC) advance payments? If yes, attach any Form(s) 1099-H you received.	<input type="checkbox"/>	<input type="checkbox"/>

Itemized Deductions (Answer below only if amounts exceed 2020 standard deduction amounts: Single: \$12,400, Married Joint: \$24,800, HoH: \$18,650)

Did you incur a casualty or theft loss or any condemnation awards in a Federally declared disaster area during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay substantial out-of-pocket medical expenses (i.e. \$5,000+)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any cash or noncash charitable contributions? If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment to substantiate all contributions made.	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay real estate taxes for your primary home and/or second home?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any mortgage interest on an existing home loan? If yes, provide any Form(s) 1098 you received.	<input type="checkbox"/>	<input type="checkbox"/>
Did you incur interest expenses associated with any investment accounts you held?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any major purchases during the year (cars, boats, etc.)? If yes, please provide purchase document(s) (appliances do not qualify).	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any energy efficient improvements to your main home this year?	<input type="checkbox"/>	<input type="checkbox"/>

Miscellaneous Information

Did you make gifts of more than \$15,000 to any individual?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any individual as a household employee during the year? If yes, did you issue any required Form(s) W-2?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive correspondence from any State or the IRS? If yes, explain or provide notice: _____	<input type="checkbox"/>	<input type="checkbox"/>
Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any Economic Impact Payment(s) (EIP or stimulus payments)? How much? _____ Please provide Notice 1444.	<input type="checkbox"/>	<input type="checkbox"/>

Foreign Information

Did you have any foreign income or pay any foreign taxes, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a distribution from, or were you a grantor or transferor for a foreign trust or estate?	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input type="checkbox"/>



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