The following questions MUST be answered for the year 2020

Client Name(s)___________________________________**Date(s) of Birth** __________

Occupation: (taxpayer**)**___________________ **(**spouse**)**__________________________

Email Address______________________________ **Phone #**_____________________

If you will be receiving a **REFUND** and would like it directly deposited into your checking account, please attach a voided check.

Voided checks must be provided prior to completion of your tax return.
A new voided check is required each year to verify the bank information.

1. Marital Status: Married____ Single_____ Widowed_____ **Divorced_____ **Separated_____

**If Divorced or Separated: Original date of divorce or separation agreement____________

**Alimony paid $___________ or received in 2020 $____________

List everyone else who lived in your home in **2020** incl. spouse (continue on last page if necessary)

Name	Date of Birth	Relationship to you	Months lived with you, if less than 12

Can anyone else claim any of the people listed above? YES_____ NO_____ (elaborate on last page)
(ex. They provided >50% of their support and are claiming themselves, or another parent is claiming them)

2. Were you or dependents covered by health insurance on the MARKETPLACE-OBAMACARE (healthcare.gov) **ANY month of 2020**? YES___NO__ (MUST HAVE **1095-A** TO COMPLETE THE TAX RETURN)

3. What was the amount of the first **Economic Impact Payment (Stimulus)** you received in Spring of 2020? $___________ And the amount of the second EIP received at the end of 2020 or beginning of 2021. $___________. Please bring Notice 1444 which was sent to you after receiving each payment or let us know the amount you received. (We **MUST** know amounts if **LESS** than maximum to get add'l amounts)

4. Did you or your spouse receive **Unemployment Benefits in 2020**? Y_____ N_____ If so, we MUST have a copy of the **Form 1099-G**. (Please download the Form 1099-G from the state unemployment website where you claim your benefits.)

5. Did you make any charitable **cash** contributions **in 2020** even if you do not itemize? (this includes cash (w/ receipts), check or credit card donations). **Keep receipts or other proof since IRS may ask for them.** Total Contributions $___________ Does **not** include donations of clothing or other non-cash items.

6. Did you receive any Medical Loss Ratio Rebates from a Health Insurance Company? Y_____ N_____

7. Tuition paid for you and/or your dependents **in 2020 (MUST HAVE FORM 1098-T AND RECEIPTS ---- SCHOOL PRINT OUT OF 2020 ACCT ACTIVITY IS REQUIRED FOR DUE DILIGENCE)**

8. Student Loan interest paid for you and/or dependents **in 2020 (MUST HAVE Form 1098-E)** __________

9. Childcare expenses paid in 2020 (daycare, preschool, etc.) & daycare info $_______ (NEED DAYCARE INFO)

10. Did you buy/sell a home or refinance mortgage or take out a home equity loan in 2020? Y___ N___
If yes, we need the settlement sheet(s).
---IF HOME EQUITY LOAN, what were the loan proceeds used for?
EXPLAIN____

11. If you moved in 2020: Date moved_______ New address____________________________________

12. Did you sell any stocks or property in 2020? Y___ NO___ **If YES, we need cost basis information. (Date purchased and purchase price)---** Usually provided on Broker's 1099-B forms

13. At any time in 2020 did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (like BITCOIN)? Y___ N ___ **(MUST BE ANSWERED FOR TAX RETURN!)**
--WILL NEED DOCUMENTATION OF VIRTUAL CURRENCY TRANSACTIONS IN 2020--

14. If over 70 1/2 and have a traditional IRA account, did you receive a **Qualified Charitable Distribution** from your IRA account in 2020? ___________ If yes, how much_______________?

15. Required Minimum Distributions from IRAs were not required 2020. If you are over 70 1/2 did you take a distribution from your IRA Y_____ N______. **If yes, we need form 1099-R.**

16. If you own a rental property, please complete the **client rental questionnaire** available on website.

17. Please provide the amount and for WHOM the following contributions were made, if any.
(this does not apply to contributions made through your employment):

2020 Roth IRA Contribution $____________ ____

2020 Trad'l IRA Contribution $ ___________ ____

2020 529 Plan Contribution $____________ ____

2020 ABLE Contribution $____________ ____

18. Did you purchase and install energy-efficient items in your home in 2020? (such as windows, furnace, insulation, exterior doors, hot water heaters, etc.) **NOT APPLIANCES**. Y___ N___
If so list____ (Need invoices/receipts)

Did you purchase & install energy-efficient **SOLAR, WIND OR GEOTHERMAL** property in 2020?
Y__ N __ If so, list____ (Need invoices/ receipts)

19. **For PA & Local Return only**. List any unreimbursed work-related **expenses and amounts paid** (union dues, tools, uniforms, etc.) you paid in 2020 **(State may ask for documentation to verify expenses so be sure to keep receipts or other proof)**

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20. Did you purchase any taxable items online or in another state and pay NO sales tax? **Y____ N____**
(MUST BE ANSWERED FOR PA TAX RETURN)

a. -If yes (or not sure), you MUST select one of the following as to how to determine your **use tax** obligation:

b. _______ I/we purchased taxable goods or services during the year which no sales tax was paid was less than $1,000 and I/we will pay an **estimated use tax** according to the table provided by the PA Dept. of Revenue based upon my income level (ex. <$15K income=$6 & $50-75K income=$23)

c. _______ I/we purchased taxable goods or services during the year for which the seller did not charge or collect sales tax from me/us. The amount of those sales and/or services to me totaled $_________

d. $_________ for my spouse, this year

21. Did you make any gifts to anyone directly or through a trust exceeding $15,000 per person?
Y__ N__

22. **For 2021**, do you expect a significant increase or decrease in income, deductions or withholding?
Y__ N__

23. Do you or your spouse have any financial accounts or any interest/ownership in income producing property located outside the U.S.? Y___ N___

24. Have you provided **ALL** of your income from **ALL** sources? Yes_____ NO_____
(if NO, explain below)

Please check if you are interested in any of the following: (feel free to contact us after tax season as well)

- ❐ Establishing an IRA and/or personal retirement plan
- ❐ Budgeting and cash flow planning
- ❐ Evaluate current life insurance, disability insurance and retirement program for adequacy
- ❐ Project future tax liabilities and find ways to defer or reduce future taxes (income tax planning)
- ❐ Obtain an independent professional review of current investments

Additional Comments/Questions:

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WE REQUEST EVERYONE TO FILL IN THE ID INFORMATION BELOW ***EACH YEAR*** (IT CAN SPEED UP YOUR STATE REFUND (**NY STATE REQUIRES** THE INFORMATION FOR **ALL** RETURNS FILED)

____________________________x____

Taxpayer Name #1 (*print*) **Signature** **Date**

Driver's License (or State ID) #___________________ Date Issued _________ Expires___________

____________________________x____

Taxpayer Name #2 (*print*) **Signature** **Date**
(if joint return)
Driver's License (or State ID) #__________________ Date Issued __________ Expires___________