

****ALL NEW CLIENTS NEED COPY OF 2020 TAX RETURN FOR FEDERAL & STATE *******

THIS FORM NEEDS TO BE COMPLETED AND RETURNED WITH TAX DOCUMENTS

Did you or spouse receive any unemployment income? If yes, please provide 1099G	Yes/No
Did you receive retirement or Social Security benefits? If yes please include Statement from SSA-1099	Yes/No
Did you have any gambling winnings/losses If yes please include W2G's and loss documentation	Yes/No
Did you sell any stocks, bonds, mutual funds or other assets? Will need to provide a 1099	Yes/No
Did you make any contributions (outside of payroll) to any IRA in 2021? IRA – Traditional or Roth Amount_____	Yes/No
Did you take early withdrawal or distributions from 401K and or Roll over a 401K – Will need to provide a 1099	Yes/No
Do you have Mortgage Interest? Will need to provide 1099-INT	Yes/No
Do you have Real estate/Property Tax to deduct? Will need to provide documentation OR dollar amount	Yes/No
Did you purchase any Residential Energy property? Will need documentation and proof of Energy Star Certified	Yes/No
Did you pay for child care expense while you worked? Will need documentation for provider	Yes/No
Did you pay college tuition/expenses for yourself or dependent in 2021? Provide a 1098-T & Receipts	Yes/No
Have you taken American Opportunity or Lifetime Learning Education Credit previous tax returns? (Need years taken)	Yes/No
Did you contribute/withdraw money from an educational IRA or 529 plan? Will need to include 1098-Q	Yes/No
Did you pay interest on college loans? Will need to provide a 1098-E to report interest deduction	Yes/No
Did you have any debt cancelled/forgiven (credit card,etc.) or a mortgage principle reduction? Will need 1099-C	Yes/No
IA residents – Will you be deducting License Registration: Will need payment amount & documents if available	Yes/No
Did you pay Registration fees/tuition for your dependents, grades K-12? Need amount paid	Yes/No
Did you contribute money to HSA account (Health Savings Account)? Will need to provide 5498-SA and/or 1099-SA	Yes/No
Did you operate any Rental Property during tax year?	Yes/No
Did you sell property that you lived in less than 2 years or had capital gains of \$250,000 or more?	Yes/No
Are you a member/beneficiary of an S-Corp, Partnership, Estate, Trust, Etc? Include all K-1	Yes/No
Did you purchase insurance through Market Place? Will need to provide 1099-A	Yes/No
Did you make any estimated tax payments for this tax year to Federal and/or State? Will need dates & amount paid	Yes/No
**Did you receive 3rd stimulus payment? Date Received_____ Amount Received_____	Yes/No
**Did you receive the Advanced Child Tax Payments? Copy of letter 6419 or 6419-A is REQUIRED	Yes/No
Are you a Volunteer Fire Fighter?	Yes/No
Does someone hold a Power of Attorney for you?	Yes/No
Do you want a Paper Copy or Emailed Copy of your Tax Return?	Paper / Email