

## Questionnaire

Name:

SSN:

## Questionnaire

**Personal Information****Yes No**  Did your marital status change during the year?

If "Yes," explain \_\_\_\_\_

  Can you or your spouse be claimed as a dependent by someone else?  Did your address change during the year?  Were you, your spouse, or any dependents a victim of identity theft?

If "Yes," explain \_\_\_\_\_

  Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?

If "Yes," provide Notice CP01A from the IRS.

Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)

**Dependent Information****Yes No**  Did you have any changes in dependents during the year?

If "Yes," explain \_\_\_\_\_

  Can another person qualify to claim any of your dependents?  Did you have any childcare expenses during the year?  Did you have any adoption expenses during the year?  Did you have any children under age 19 or a full-time student under age 24 with more than \$2200 of unearned

Provide documentation for proof of dependent related credits (school records, medical records, daycare records, etc.)

**Health Care Information****Yes No**  Did any member of your household have healthcare coverage through the Marketplace?

If "Yes," provide copies of Form 1095-A.

  Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?**Income, Purchases, Sales, and Debt Information****Yes No**  Did you receive any tips not reported to your employer?  Did you receive any disability income during the year?  Did you cash in any U.S. savings bonds during the year?  Did you start a new business or purchase any rental property during the year?  Did you sell an existing business, rental property, or other property during the year?  Did you purchase any business assets or convert any assets to business use?

If "Yes," provide the cost of the asset, the date it was placed in service, and business use percentage.

  Did you buy or sell any stocks, bonds, or other investments during the year?  Did you buy, sell, exchange, or transfer title to any real estate during the year?

If "Yes," provide closing documentation for the purchase and sale of the home.

  Did you refinance your principal home or second home or take out a home equity loan during the year?

If "Yes," provide all escrow, closing, and other pertinent documentation and information.

  Did you receive any principal or interest during this year from property sold in prior years?  Did you rent out your home or use it for business?  Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)?

If "Yes," provide documentation.

  Did you have any debts canceled or forgiven this year?  Does anyone owe you money that has become uncollectible?  Did you acquire a new or additional interest in a partnership or S corporation?  Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?

If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service.

  Did you receive income or incur expenses associated with a fantasy sport league?

If "Yes," provide documentation.

  Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?

If "Yes," attach Form 1099-MISC and Form 1099-K.

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- Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?  
If "Yes," attach Form 1099-K or Form W-2.
- Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?  
If "Yes," provide documentation.
- Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?  
If "Yes," attach Form 1099-K.
- Did you receive any other income you have not provided information for with this organizer?  
If "Yes," explain \_\_\_\_\_

## Retirement Information

## Yes No

- Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year?
- Did you make any contributions to, withdrawals from, or execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you receive any Social Security benefits during the year?

## Education Information

## Yes No

- Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
- Did anyone in your household attend a post-secondary school during the year?
- Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
- Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?

## Foreign Tax Information

## Yes No

- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
- Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
- Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?
- Did you have any income from, or pay taxes to, a foreign country?
- Did you own property in a foreign country?

## Miscellaneous Information

## Yes No

- Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies?
- Did you incur a gain or loss due to damaged or stolen property?  
If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements.
- Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
- Did you make gifts to any one person in excess of \$15,000 during the year?  
**Yes No**  
  If "Yes," are you splitting the gift with your spouse?
- Did you incur moving expenses during the year?
- Did you make any energy-efficient improvements to your main home during the year?
- Are you a business owner who paid health insurance premiums for your employees during the year?
- Did you own interest or shares in a Qualified Opportunity Fund?
- Did you apply an overpayment of your 2019 taxes to your 2020 estimated taxes?
- If you have an overpayment of 2020 taxes, do you want the refund applied to your 2021 estimated taxes?
- Did you make any estimated payments toward your 2020 taxes?
- Do you want to have any refund or balance due directly deposited or withdrawn?  
If "Yes," provide a canceled checking or savings slip.
- Do you anticipate your income or withholdings to be different for 2020?
- Did you make any purchases subject to Use Tax?  
If "Yes," provide details.

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## Itemized Deduction Information

## Yes No

- Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
- Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
- Did you make any major purchases (vehicle, boat, etc.) during the year?
- Did you pay any real estate property taxes or personal taxes during the year?
- Did you pay mortgage interest during the year?
- Did you make cash donations to charity during the year?
- Did you make noncash donations to charity (clothes, furniture, etc.) during the year?
- Did you donate a boat or vehicle during the year?  
If "Yes," attach Form 1098-C.
- Did you have gambling winnings or losses during the year?
- Did you have any job-related expenses that were not reimbursed by your employer (uniforms, safety equipment, etc.) during the year?
- Did you use your vehicle on the job other than for commuting to work?
- Did you work out of town at any time during the year?

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- Did you receive any notices from the IRS or state taxing authority that we don't already know about?  
If "Yes," explain \_\_\_\_\_
- Would you like a copy of your tax return sent to you electronically instead of receiving a printed copy?
- Did you receive any Economic Impact Payments or Recovery Rebates?  
Amount of first Stimulus Payment: \_\_\_\_\_  
Amount of second Stimulus Payment: \_\_\_\_\_