

Questionnaire

Please answer the following questions and include all necessary details and/or documentation to support your "Yes" answers

REQUIRED QUESTIONS

Yes No

Personal Information

Did you change any bank accounts, or did any banking information change, i.e. routing transit number or bank account number?

Do you wish to have REFUND, if any, direct deposited? Provide banking info

Do you wish to have TAXES owed paid by direct debit? Provide banking info

Income Items

Did you have any sales or other exchanges of virtual currencies (including from an airdrop or a hard fork, or used virtual currencies to pay for goods or services)?

Were you required to prepare 1099's for your small business or Rental activity?

If required to prepare 1099's, did/will you prepare and send all 1099's?

Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax

Health Care Information

Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family?

"Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent. If yes, attach any Form(s) 1095-B and/or 1095-C you received.

Foreign Assets

Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?

Do 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?

If any of the following apply to you, let me know. It could help avoid delays and/or result in a lower tax liability

Personal Information

Your marital status changed during the year

If so, explain: _____

Address change from last year

You can be claimed as a dependent by another taxpayer

You received an Identity Protection PIN (IP PIN) from the IRS or you have been a victim of identity theft? If so, attach the IRS letter.

You want to designate \$3 to the Presidential Election Campaign Fund? If so, it will not change your tax or reduce your refund.

Health Care Information

You enrolled for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If so, attach any Form(s) 1095-A you received.

You enrolled for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family

You made any contributions to a Health savings account (HSA) or Archer MSA

You received any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year

You paid long-term care premiums for yourself or your family. If so, provide amount for each insured.

You made any contributions to an ABLE (Achieving a Better Life Experience) account. If so, attach any Form(s) 5498-QA you received.

You received any withdrawals from an ABLE (Achieving a Better Life Experience) account. If so, attach any Form(s) 1099-QA you received.

If you are a business owner, and you paid health insurance premiums for your employees this year.

You received any Health Coverage Tax Credit (HCTC) advance payments If so, provide any Form(s) 1099-H you received.

COVID-19 Information

- You received an Economic Impact Payment (EIP) as reported on Notice 1444
- You receive a Paycheck Protection Program (PPP) loan
- You applied for Paycheck Protection Program (PPP) loan forgiveness
- You a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state
- You received emergency leave sick pay
- You received emergency family leave wages
- You received any special unemployment benefits or compensation under the Coronavirus Relief Act during the year
- You are self-employed, and you were unable to perform your self-employed activities due to coronavirus related care you needed
- You are self-employed, and you were unable to perform your self-employed activities due to coronavirus related care you provided to your son or daughter under the age of 18
- You are self-employed, and you were unable to perform your self-employed activities due to coronavirus related care you provided to another

Dependent information

- Changes in dependents from the prior year
- Children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,200
- You have dependents who must file a tax return.
- You provide over half the support for any other person(s) other than your dependent children during the year.
- You pay for childcare while you worked, looked for work, or while a full-time student.
- You pay any expenses related to the adoption of a child during the year.
- You are divorced or separated with child(ren), do you have a divorce decree, or other form of separation agreement which establishes custodial responsibilities
- You have any dependents who received an Identity Protection PIN (IP PIN) from the IRS or have been a victim of identity theft. If so, attach the IRS letter.

Purchases, Sales and Debt Information

- Started a new business or purchase rental property during the year.
- You sold, exchanged, or purchased any assets used in your trade or business.
- You acquired a new or additional interest in a partnership or S corporation.
- You sold, exchanged, or purchased any real estate during the year.
- You purchased or sold a principal residence during the year.
- You had a foreclosure or abandoned a principal residence or real property during the year.
- You acquired or disposed of any stock during the year.
- You took out a home equity loan this year.
- You refinanced a principal residence or second home this year.
- You sold an existing business, rental, or other property this year.
- You lent money with the understanding of repayment and this year it became totally uncollectable.
- You have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)
- You purchased a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year.

Income Information

- 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.
- You received any income from property sold prior to this year.
- You received any unemployment benefits during the year.
- You receive any disability income during the year.
- You received any Medicaid waiver payments as difficulty of care during the year.
- You received tip income not reported to your employer this year.
- If any of your life insurance policies matured, or if you surrendered any policies.
- You received any awards, prizes, hobby income, gambling, or lottery winnings.
- You received any income considered to be nonemployee compensation.
- You expect a large fluctuation in income, deductions, or withholding next year.

Retirement Information

- You are an active participant in a pension or retirement plan
- You received any Social Security benefits during the year
- You made any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan. If so, state whether any withdrawals due to a Federally declared disaster or COVID-19. If you received any qualified disaster retirement plan distributions, and you repaid any of the distributions in 2020
- You received any lump-sum payments from a pension, profit sharing or 401(k) plan
- You made any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan.

Education Information

You, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year.

You have any educational expenses during the year on behalf of yourself, your spouse, or a dependent.

If so, provide any Form(s) 1098-T and receipts for qualified tuition and related expenses.

If anyone in your family received a scholarship of any kind during the year If so, state whether any of the scholarship funds used for expenses other than tuition, such as room and board

You made any withdrawals from an education savings or 529 Plan account If so, state whether any of these withdrawals rolled over into an ABLÉ (Achieving a Better Life Experience) account

You made any contributions to an education savings or 529 Plan account.

You paid any student loan interest this year.

You cashed any Series EE or I U.S. Savings bonds issued after 1989.

If you would like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education, please email me a request.

Itemized Deduction Information

You incurred a casualty or theft loss or any condemnation awards during the year If so, state whether the loss . occur in a Federally declared disaster area.

You paid out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)

You made any cash or noncash charitable contributions (clothes, furniture, etc.) If so, please provide evidence. such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made.

You donated a vehicle or boat during the year. If so, attach Form 1098-C or other written acknowledgment from the donee organization.

You paid real estate taxes for your primary home and/or second home.

You paid any mortgage interest on an existing home loan. If so, provide any Form(s) 1098 you received.

You incurred interest expenses associated investment accounts you held.

You made any major purchases during the year (cars, boats, etc.)

Miscellaneous Information

You made gifts of more than \$15,000 to any individual

You utilized an area of your home for business purposes.

You engaged in any bartering transactions.

You retire or change jobs this year.

You incurred moving costs because of a permanent change of station as a member of the Armed Forces on active duty

You paid any individual as a household employee during the year.

You made energy efficient improvements to your main home this year.

You received correspondence from the State or the IRS? If so, explain: _____

You have previous years of tax returns that are either unfiled or filed with unpaid balances due.

If you have any other special circumstances that are not listed above, please provide details below.