

# New Client Information

Taxpayer

Spouse

Name \_\_\_\_\_

Name \_\_\_\_\_

Social Security Number \_\_\_\_\_

Social Security Number \_\_\_\_\_

Date of Birth \_\_\_\_\_

Date of Birth \_\_\_\_\_

Occupation \_\_\_\_\_

Occupation \_\_\_\_\_

Phone # \_\_\_\_\_

Phone # \_\_\_\_\_

Email\* \_\_\_\_\_

Email\* \_\_\_\_\_

Drivers License # \_\_\_\_\_ State \_\_\_\_\_

Drivers License # \_\_\_\_\_ State \_\_\_\_\_

Issue Date \_\_\_\_\_ Expiration Date \_\_\_\_\_

Issue Date \_\_\_\_\_ Expiration Date \_\_\_\_\_

\*Or copy of Drivers License

\*Or copy of Drivers License

Address \_\_\_\_\_  
\_\_\_\_\_

Filing Status \_\_\_\_\_

Military Home of Record \_\_\_\_\_

\* Your client portal will be setup using the email address provided. Client Center is an online platform that will allow documents to be sent, received and stored securely. Once we create your Client Center, you will receive an email "Register Your Client Center Account" to register your account.

Dependents - See Dependent Questionnaire

Did you have health insurance provided through the Marketplace? \_\_\_\_\_ Yes \_\_\_\_\_ No

If applicable to your return - are you interested in making a contribution to a retirement plan for additional tax savings? \_\_\_\_\_ Yes \_\_\_\_\_ No  
\_\_\_\_\_ Discuss Further

Did you donate at least \$300 to a charitable organization in 2020? \_\_\_\_\_ Yes \_\_\_\_\_ No

Do you own or have access to any foreign accounts? \_\_\_\_\_ Yes \_\_\_\_\_ No

Did you receive the 1st 2020 EIP (Stimulus check)? \_\_\_\_\_ Yes \_\_\_\_\_ No  
Amt Received \$ \_\_\_\_\_

Did you receive the 2nd 2020 EIP (Stimulus check)? \_\_\_\_\_ Yes \_\_\_\_\_ No  
\*Second payment went out December 2020/January 2021  
Amt Received \$ \_\_\_\_\_

- I would like my tax liability automatically drafted from my bank account  
 I would like my tax refund directly deposited into my bank account

Bank Name \_\_\_\_\_ Routing Number \_\_\_\_\_ Account number \_\_\_\_\_

# Dependent Questionnaire

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## Dependent 1

Name \_\_\_\_\_

Social Security # \_\_\_\_\_

Date of Birth \_\_\_\_\_

Relationship \_\_\_\_\_

Any childcare or afterschool expenses? \_\_\_\_\_

Did the dependent live with the taxpayer all year? \_\_\_\_\_

Is the dependent in college? \_\_\_\_\_

Can anyone else claim the dependent? \_\_\_\_\_

## Dependent 2

Name \_\_\_\_\_

Social Security # \_\_\_\_\_

Date of Birth \_\_\_\_\_

Relationship \_\_\_\_\_

Any childcare or afterschool expenses? \_\_\_\_\_

Did the dependent live with the taxpayer all year? \_\_\_\_\_

Is the dependent in college? \_\_\_\_\_

Can anyone else claim the dependent? \_\_\_\_\_

## Dependent 3

Name \_\_\_\_\_

Social Security # \_\_\_\_\_

Date of Birth \_\_\_\_\_

Relationship \_\_\_\_\_

Any childcare or afterschool expenses? \_\_\_\_\_

Did the dependent live with the taxpayer all year? \_\_\_\_\_

Is the dependent in college? \_\_\_\_\_

Can anyone else claim the dependent? \_\_\_\_\_

## Dependent 4

Name \_\_\_\_\_

Social Security # \_\_\_\_\_

Date of Birth \_\_\_\_\_

Relationship \_\_\_\_\_

Any childcare or afterschool expenses? \_\_\_\_\_

Did the dependent live with the taxpayer all year? \_\_\_\_\_

Is the dependent in college? \_\_\_\_\_

Can anyone else claim the dependent? \_\_\_\_\_

## Questions

Please check the appropriate box and include all necessary details and documentation.

	Yes	No
<b>Personal Information</b>		
Did your marital status change during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: _____		
Did your address change from last year?	<input type="checkbox"/>	<input type="checkbox"/>
Can you be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	<input type="checkbox"/>	<input type="checkbox"/>
Do you, your spouse (if applicable), and any dependents have a taxpayer identification number (SSN, ITIN, or ATIN)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you 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? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires.	<input type="checkbox"/>	<input type="checkbox"/>
<b>COVID-19 Information</b>		
Did you receive an Economic Impact Payment (EIP) as reported on Notice 1444?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a Paycheck Protection Program (PPP) loan?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness?	<input type="checkbox"/>	<input type="checkbox"/>
Are 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?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive emergency leave sick pay?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive emergency family leave wages?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you needed?	<input type="checkbox"/>	<input type="checkbox"/>
If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to your son or daughter under the age of 18?	<input type="checkbox"/>	<input type="checkbox"/>
If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to another?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Dependent Information</b>		
Were there any changes in dependents from the prior year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: _____		
Do you have any children under age 19 or a full-time student under age 24 with unearned 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 other 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"/>
Did you pay any expenses related to the adoption of a child during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	<input type="checkbox"/>	<input type="checkbox"/>
Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or	<input type="checkbox"/>	<input type="checkbox"/>

have they been a victim of identity theft? If yes, attach the IRS letter. p p

**Purchases, Sales and Debt Information**

Did you start a new business or purchase rental property during the year? p p  
Did you sell, exchange, or purchase any assets used in your trade or business? p p  
Did you acquire a new or additional interest in a partnership or S corporation? p p  
Did you sell, exchange, or purchase any real estate during the year? p p  
Did you purchase or sell a principal residence during the year? p p  
Did you foreclose or abandon a principal residence or real property during the year? p p  
Did you acquire or dispose of any stock during the year? p p  
Did you take out a home equity loan this year? p p  
Did you refinance a principal residence or second home this year? p p  
Did you sell an existing business, rental, or other property this year? p p  
Did you lend money with the understanding of repayment and this year it became totally uncollectable? p p  
Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)? p p  
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? p p

**Income Information**

Did 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? p p  
Did you receive any income from property sold prior to this year? p p  
Did you receive any unemployment benefits during the year? p p  
Did you receive any disability income during the year? p p  
Did you receive any Medicaid waiver payments as difficulty of care during the year? p p  
Did you receive tip income not reported to your employer this year? p p  
Did any of your life insurance policies mature, or did you surrender any policies? p p  
Did you receive any awards, prizes, hobby income, gambling or lottery winnings? p p  
Did you receive any income considered to be nonemployee compensation? p p  
Do you expect a large fluctuation in income, deductions, or withholding next year? p p  
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? p p

**Retirement Information**

Are you an active participant in a pension or retirement plan? p p  
Did you receive any Social Security benefits during the year? p p  
Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? p p  
If yes, were any withdrawals due to a Federally declared disaster or COVID-19? p p  
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2020? p p  
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan? p p  
Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? p p

**Education Information**

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year? p p  
Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, attach any Form(s) 1098-T and receipts for qualified tuition and related expenses p p  
Did anyone in your family receive a scholarship of any kind during the year? p p  
If yes, were any of the scholarship funds used for expenses other than tuition,

such as room and board?	p	p
Did you make any withdrawals from an education savings or 529 Plan account?	p	p
If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?	p	p
Did you make any contributions to an education savings or 529 Plan account?	p	p
Did you pay any student loan interest this year?	p	p
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	p	p
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?	p	p

**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.	p	p
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, attach any Form(s) 1095-A you received.	p	p
Did you enroll 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?	p	p
Did you make any contributions to a Health savings account (HSA) or Archer MSA?	p	p
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	p	p
Did you pay long-term care premiums for yourself or your family?	p	p
Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 5498-QA you received.	p	p
Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 1099-QA you received.	p	p
If you are a business owner, did you pay health insurance premiums for your employees this year?	p	p
Did you receive any Health Coverage Tax Credit (HCTC) advance payments? If yes, attach any Form(s) 1099-H you received.	p	p

**Itemized Deduction Information**

Did you incur a casualty or theft loss or any condemnation awards during the year? If yes, did the loss occur in a Federally declared disaster area?	p	p
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	p	p
Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? 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.	p	p
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgment from the donee organization.	p	p
Did you pay real estate taxes for your primary home and/or second home?	p	p
Did you pay any mortgage interest on an existing home loan? If yes, attach any Form(s) 1098 you received.	p	p
Did you incur interest expenses associated with any investment accounts you held?	p	p
Did you make any major purchases during the year (cars, boats, etc.)?	p	p
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?	p	p

**Miscellaneous Information**

Did you make gifts of more than \$15,000 to any individual?	p	p
Did you utilize an area of your home for business purposes?	p	p
Did you engage in any bartering transactions?	p	p
Did you retire or change jobs this year?	p	p
Did you incur moving costs because of a permanent change of station as a member		

of the Armed Forces on active duty?	p	p
Did you pay any individual as a household employee during the year?	p	p
Did you make energy efficient improvements to your main home this year?	p	p
Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?	p	p
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?	p	p
Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	p	p
Did you receive correspondence from the State or the IRS?	p	p
If yes, explain: _____		
Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?	p	p
Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.	p	p