

## Tax Year Questionnaire

Client(s) Name \_\_\_\_\_

To assist us in accurately preparing your return, please provide answers to the following questions:

### Personal Information:

- Did your marital status change during the year?  Yes  No  
If yes, please explain \_\_\_\_\_
- Can you or your spouse be claimed as a dependent by someone else?  Yes  No
- Did your address change during the year?  Yes  No
- Were you, your spouse, or any dependents a victim of identity theft?  Yes  No  
If yes, please explain \_\_\_\_\_
- Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?  Yes  No  
If yes, please provide Notice CP01A from the IRS

*To be eligible for e-file of your return, please provide proof of identity (driver's license or state-issued photo ID)*

### Dependent Information:

- Did you have any changes in dependents during the year?  Yes  No  
If yes, please explain \_\_\_\_\_
- Can another person qualify to claim any of your dependents?  Yes  No
- Did you have any childcare expenses during the year?  Yes  No
- Did you have any adoption expenses during the year?  Yes  No
- Did you have any children under age 19 or a full-time student under age 24 with more than \$2,200 of unearned income (investment gains, dividends, interest etc.)?  Yes  No

*Please provide documentation of dependent related credits (school records, medical records, daycare records, etc.)*



## COVID-19 Implications:

- Did you receive an Economic Impact Payment?  Yes  No  
 If yes, please provide Notice 1444 from the IRS
- Did you or your spouse experience economic loss due to COVID-19 (loss of job, closed business, etc.)?  Yes  No
- Were you or your spouse unemployed for any portion of the year due to COVID-19?  Yes  No
- Did you or your spouse continue to receive wages from your employer even if you were unable to work?  Yes  No
- Did you or your spouse receive a distribution from a retirement plan (401(k), IRA, etc.) due to COVID-19?  Yes  No
- If you or your spouse own a business or farm, did you continue to pay any employees while they were not working?  Yes  No
- If you or your spouse own a business or farm, did you delay withholding FICA taxes from any employee's pay?  Yes  No
- If you or your spouse own a business or farm, did you receive a Paycheck Protection Program (PPP) loan?  Yes  No  
 If yes, was the loan forgiven or have you applied or intend to for forgiveness?  Yes  No
- If you or your spouse own a business or farm and were unable to work due to COVID-19, would you have qualified for sick or family leave if employed by someone other than yourself?  Yes  No

## Health Care Information:

- Did any member of your household have healthcare coverage through the Marketplace (healthcare.gov)?  Yes  No  
 If yes, please 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?  Yes  No  
 If yes, please provide copies of Form 5498-SA



## Income, Purchases, Sales and Debt Information:

- Did you receive any tips not reported by your employer?  Yes  No
- Did you receive any disability income during the year?  Yes  No
- Did you cash in any U.S. savings bonds during the year?  Yes  No
- Did you start a new business or purchase any rental property during the year?  Yes  No
- Did you sell an existing business, rental property, or other property during the year?  Yes  No
- Did you purchase any business assets or convert any assets to business use?  Yes  No  

If yes, please provide the cost of the asset, the date it was placed in service, and business use percentage
- Did you purchase any gasoline, diesel, or special fuels for off-road business use?  Yes  No
- Did you buy or sell any stocks, bonds, or other investments during the year?  Yes  No
- Did you sell your principal residence during the year?  Yes  No  

If yes, please provide the closing documentation from both the purchase and sale of the home
- Did you have a principal residence or piece of real property foreclosed on during the year?  Yes  No
- Did you abandon a principal residence or a piece of real property during the year?  Yes  No
- Did you refinance your principal residence or second home or take out a home equity loan during the year?  Yes  No  

If yes, please provide all escrow, closing and other pertinent documentation
- Did you receive any payments during this year from property sold in prior years?  Yes  No
- Did you rent out your home or use it for business?  Yes  No
- Did you sell, exchange, or purchase any real estate during the year?  Yes  No
- Did you acquire a new or additional interest in a partnership or S corporation?  Yes  No
- Did you have any debts canceled or forgiven this year?  Yes  No





- Does anyone owe you money that has become uncollectible?  Yes  No
- Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?  Yes  No  

If yes, please provide the year, make, model, VIN, and date vehicle was placed in service \_\_\_\_\_
- Did you receive income or incur expenses associated with a fantasy sport league?  Yes  No
- Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?  Yes  No
- Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?  Yes  No
- Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?  Yes  No
- Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?  Yes  No
- Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)?  Yes  No
- Did you receive any other income you have not provided information for?  Yes  No  

If yes, please explain \_\_\_\_\_

### Itemized Deduction Information:

- Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?  Yes  No
- Did you pay any long-term care premiums for you, your spouse, or a dependent during the year?  Yes  No
- Did you receive any state or local income tax refunds from prior years?  Yes  No
- Did you make any major purchases (vehicle, boat, etc.) during the year?  Yes  No
- Did you pay any real estate or personal property taxes during the year?  Yes  No
- Did you pay mortgage interest during the year?  Yes  No



- Did you make cash donations to charity this year?  Yes  No
- Did you make noncash donations to charity (clothes, furniture, etc.) during the year?  Yes  No
- Did you donate a boat or vehicle during the year?  Yes  No  

If yes, please provide Form 1098-C
- Did you have gambling winnings or losses during the year?  Yes  No
- Did you have any job-related expenses that were not reimbursed by your employer (uniforms, safety equipment, etc.)?  Yes  No
- Did you use your vehicle on the job other than for commuting to work?  Yes  No
- Did you work out of town at any time during the year?  Yes  No

### Retirement Information:

- Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year?  Yes  No
- 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?  Yes  No
- Did you receive any Social Security benefits during the year?  Yes  No  

If yes, please provide Form 1099-SSA

### Education Information:

- Did you pay tuition expenses that were required for attending college, university, or vocational school for you, your spouse, or a dependent during the year (even if classes were attended in another year)?  Yes  No
- Did anyone in your household attend post-secondary school during the year?  Yes  No
- Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?  Yes  No
- Did you pay interest on a student loan for yourself, your spouse, or your dependent(s) during the year?  Yes  No



## Other Information:

- Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies (e.g., Bitcoin, Litecoin, etc.)?  Yes  No
- Did you incur a gain or loss due to damaged or stolen property?  Yes  No  
 If yes, please 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.)?  Yes  No
- 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?  Yes  No
- Did you incur moving expenses during the year?  Yes  No
- Did you make any energy-efficient improvements to your main home during the year?  Yes  No
- Are you a business owner who paid health insurance premiums for your employees during the year?  Yes  No
- Did you own interest or shares in a Qualified Opportunity Fund?  Yes  No
- Did you apply an overpayment of your 2019 taxes to your 2020 estimated taxes?  Yes  No
- If you have an overpayment of 2020 taxes, do you want the refund applied to your 2021 estimated taxes?  Yes  No
- Did you make any estimated payments toward your 2020 taxes?  Yes  No  
 If yes, please provide the dates and amounts (e.g., canceled check images)
- Did you make any purchases subject to Use Tax (e.g., internet purchases without sales tax charged)?  Yes  No
- Did you receive any notices from the IRS or state taxing authority?  Yes  No
- May the IRS discuss your tax return with your preparer?  Yes  No
- Would you like a copy of your tax return sent to you electronically instead of receiving a printed copy?  Yes  No



**Foreign Tax Information:**

- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?  Yes  No
- If yes, did the aggregate value exceed \$10,000 any time during the year?  Yes  No
- Did you receive a distribution from, or were you a grantor of, or a transferor to, a foreign trust?  Yes  No
- Did you have any income from, or pay taxes to, a foreign country?  Yes  No
- Do you own property in a foreign country?  Yes  No

**Preparer Notes:**

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