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Individual Questionnaire for 2020

CLIENT NAME: _____

CLIENT EMAIL ADDRESS: _____

Please circle "Y" for Yes or "N" for No

Personal Information

- Y N Did your marital status change during the year? If yes, explain: _____
Y N Did your residence change during the year?(If yes, when and where, plus we should fillout Form 8822)
Y N Can you be claimed as a dependent by another taxpayer?
Y N Are you a Retired Public Safety Officer? If yes, need health insurance paid for the year: _____
Y N Are you (your spouse) a U.S. Citizen? If No, Resident Alien or Non-Resident Alien

Dependent Information (Must fill out Due Diligence Form 8867 at office)

- Y N Were there any changes in dependents from the prior year? If yes, explain: _____
Y N Did you provide over half the support for another person not claimed as a dependent?
Y N Did you pay child care for a dependent (babysitting, daycare)? Attach Form W-10 with Amount Paid

Purchases, Sales and Debt Information

- Y N Did you start, dispose of, or acquire interest in a business during the year? (attach paperwork)
Y N Did you sell, exchange, or purchase any real estate during the year? (attach closing statement)
Y N Did you dispose of any stock during the year? (attach original cost and sale price with dates)
Y N Did you take out a home equity loan, line of credit or refinance any property this year? (attach paperwork)
Y N Are you repaying the \$7,500 first time home buyers credit from 2008 (2010-2025)?
Y N Did you file Bankruptcy in 2020? Chapter 7 (Full) or Chapter 13 (Repayment Plan) Attach Bankruptcy Letter
Y N Did you receive debt forgiveness in 2020? Provide 1099-A or 1099-C

Income Information

- Y N Do you have any W-2's? Attach W-2
Y N Did you receive Social Security benefits? Provide 1099-SA
Y N Did you receive any pension, profit sharing or IRA money? Attach 1099-R
Y N Is the above distribution a CRD (Coronavirus Related Distribution) (No penalty)? Attach 1099-R
Y N Do you want to divide the distribution to pay tax over 3 years (1/3 as income per year for 3 years)?
Y N Did you receive any unemployment income? Attach 1099-G
Y N Did you cash in any U.S. Savings bonds or have any interest income? Attach 1099-INT from the Bank
Y N Do you have any gambling winnings? Provide W2-G and proof of gambling losses
Y N Did you receive damages paid on account of personal injuries that are not physical injuries?
Y N Did you receive or pay alimony (not child support)? If yes, amount _____ Date of Agreement _____
Y N Did you receive executor fees or jury duty fees? If yes, amount \$ _____
Y N **Do you personally handle any Foreign Accounts? Attach documents**
Y N **Do you have a financial interest in any virtual currency? (Ex: bitcoin) Attach documents**

(TURN OVER)

TAX YEAR 2020

Credit (deduction) Information

- Y N Did you incur any adoption expenses in 2020?
- Y N Did you install geothermal heat pumps or solar/wind energy systems into your personal residence, second or vacation home?
- Y N Do you have a Flex Spending account at work? What does it pay for? _____
- Y N Did you purchase a fully electric car in 2020? (A non-refundable credit)
- Y N **Did you receive a stimulus check in the summer? Attach Form 1444 or Check #1 Amount _____**
- Y N **Did you receive a stimulus check in Dec 2020 or Jan 2021? Attach Form 1444 or Check #2 Amount _____**
- Y N **If the IRS provides a website to check on the amount of the Stimulus Payment-Economic Impact Payment (EIP) may our firm access the IRS program to verify the payment you received?**

Deduction Information

- Y N Are you a teacher or school administrator who provided school supplies in your job? If yes, \$ _____
- Y N Did you have educational expenses for you or your dependents? Attach 1098-T and receipts.
- Y N Did you or your dependent receive employer-provided educational assistance or educational benefits?
- Y N Did you pay any student loan interest this year? Attach 1098-E
- Y N Did you pay sales tax on a car, boat, motor home, manufactured home, truck, motorcycle or plane purchased for personal use (new or used)? If yes, amount: \$ _____
- Y N **Do you own your personal residence where you live? (need property tax amount paid in 2020)**
- Y N Do you have a mortgage or home equity loan? Provide 1098
- Y N **Do you pay PMI mortgage insurance?**
- Y N Review your paystub: Did you pay union dues (PA) or charitable contributions (Sch A)? If yes, bring last paystub
- Y N Did you make any charitable contributions? **Need receipts - even for cash!**
- Y N Are you keeping track of charitable miles? If yes, how many for 2020: _____ Explain
- Y N **Did you make any non-cash donations? If yes, need donation receipt, list of items and picture of items.**

Health Insurance Information

- Y N **Did you get a credit on your insurance through the market place? If yes - Provide 1095-A as proof?**
- Y N **Do you think your medical expenses exceed more than 7.5% of your income? (Bring detail)**
- Y N Are you keeping track of your medical miles? If yes, how many miles for 2020: _____
- Y N Do you have a Health Savings Account(HSA)?
If yes, attach 1099-SA showing distributions and 5498-SA showing contributions.
- Y N **Do you want to max out your HSA before 04/15/2021 for a tax deduction on your 2020 return?
Contribution Max - Family \$7,100 Single \$3,550**
- Y N Do you have self-employed Health Insurance? If yes, cost for insurance for 2020? _____

Miscellaneous Information

- Y N Did you purchase energy efficient residential items? (started in 2006 - max. lifetime credit is \$500)
- Y N Did you make gifts of more than \$15,000.00 to any individual last year?
- Y N Did you make any Roth, traditional, SIMPLE OR SEP IRA contributions? If yes, circle which one. Bring Proof
- Y N Have you ever made a non-deductible IRA contribution? Bring Proof
- Y N Did you receive correspondence from federal, state or local tax authorities that I should know about or review? If yes explain: _____
- Y N Do you want to allocate \$3 to the Presidential Election Campaign Fund?
- Y N Do you operate a self-employed business? If yes, we might have other questions
- Y N Do you have a Self-Employed Home Office? If yes, we might have other questions
- Y N Did you make estimated payments throughout the year? Check all that apply:
IRS _____ STATE _____ LOCAL _____ (Bring proof of to who, date paid and amount paid)
- Y N Next Year's Taxes: Do you expect significant changes in income, expenses or dependents? If yes, explain: _____
- Y N Would you like your refund to be direct deposit?(same as last year or bring voided check for new account)

State Information

- Y N Do you have withholding from more than one state? If yes, what other state(s) _____
- Y N Did you contribute to a 529 (college) Plan? If yes, what state plan and amount: _____
- Y N Are you retired from the military (Maryland Deduction)?
- Y N Are you a Retired Law Enforcement Officer or Fire, Rescue, or Emergency Services Personnel (MD)?
- Y N Did you qualify for the LOSAP (Length of Service Awards Program) credit (MD)? Attach and miles _____
- Y N PA Residents: Did you make untaxed purchase from out-of-state retailers (Ex: on internet)?
If yes, bring purchase receipts or amount.