



2020 Tax Questionnaire

Please complete and return this questionnaire with your tax data

Name(s) _____

Address _____ City _____ State _____ ZIP _____

Cell Phone () _____ Email _____

Cell Phone () _____ Email _____

Home Phone () _____ I want my return: Sent electronically (encrypted)

Placed in my H&S Portal

I will pick it up Mailed to me

Yes No **PERSONAL INFORMATION**

Did your marital status change during the year? If so, please explain: _____

If yes, did you change your name with the Social Security Administration?

Did your address change from last year? If so, please fill out the address section above.

Were there any changes in dependents from the prior year? If so, please explain: _____

Yes No **MISCELLANEOUS INFORMATION**

Do you have any foreign bank accounts?

Did you sell any cryptocurrency in 2020? If so, please provide details of the sale and original purchase of the currency.

Did you receive a **first** round **stimulus payment in 2020**? If so, **how much did you receive?** \$ _____

Did you receive a **second** round **stimulus payment yet?** If so, **how much did you receive?** \$ _____

Direct Deposit (check all that apply)

Direct deposited your refund last year? If so, would you like to again?

Same bank account?

No? Please provide a voided check

Did not direct deposit last year but would like to this year? Please provide a voided check

INCOME

Workin' for a livin'? If so, we need all your **W-2s**.

Found yourself or your spouse unemployed? We'd like your **1099Gs**.

Making some interest on your money? It's your **1099-INT** we need.

Invested in the market? We'll need your **1099-DIVs and 1099Bs**.

Enjoying social security benefits? Congrats, we need your form(s) **SSA-1099**.

Receiving retirement income? It'll be **1099-R** forms that we will want to see.

Are you a partner in a partnership or a shareholder in an S-Corporation? We are going to need your **K-1 form(s)**.

And the same if you are receiving any income from a trust or estate.

Got lucky at the casino or other gambling? If so, we could use your form **W-2G(s)** and your **expenses/losses**.

If you received a state or local tax refund in 2020, please also bring in forms **1099-G** that you receive.



INCOME (continued)

- Rent your property in 2020? Here's what we would like:
 - Your **income, including 1099-MISC.**
 - Your **expenses, including mileage.**
- Self-employed? Good for you! Please bring in all your **records of income, expenses, assets, and liabilities.**
- Farming? That's great! We'd like the **same records as for self-employed.**
- Sell your home? Please bring in form **1099-S, closing statement, and your cost of the home you sold.**
- Any other income? Please bring in **1099-MISC form and records of any related expenses.**

EXPENSES

- Contribute to an **IRA, SEP, SIMPLE, or plan to do so by 4/15/21?** We will want **amounts contributed for you and/or spouse.**
- How about an HSA? We will need the **same information as above and form 1099-SA.**
- Are you an educator? We will want your **unreimbursed expenses.**
- In the reserves? We salute you and request your **expenses.**
- Move while on active duty? We'd like to know **distance and your direct costs.**
- Paying on student loans? **1098-Es** we could use.
- Speaking of education ... If you or your child is attending college, we will need your form **1098-T, as well as the cost of items like books, supplies, and equipment.**
- Paying/receiving alimony?
- Itemize your deductions? If so, here's what we need:
 - List of your medical deductions.**
 - Property, sales tax, and license tab fees.**
 - Mortgage / home-equity loan interest paid to buy, build or improve your home.**
 - List of charitable contributions paid and the donation receipts (don't forget about those noncash donations).** *Even if not itemizing, you can claim up to \$300.*
 - Gambling losses incurred with gambling winnings.**
- Paying for childcare while working? We'll want **name, ID number, address, and amount paid to the provider.**
- Make energy-efficient home improvements in 2020? Please provide **details and costs.**
- Receive an ACA/Marketplace premium tax credit? We are going to need your **1095 form(s).**
- Did you make any out-of-state purchases for which the seller did not collect state sales or use tax?
- Were you a victim of identity theft within the last year? We will need a **copy of your drivers license.** If you have received a **letter from the IRS with an assigned IP PIN number** for the 2020 tax year, please provide that, as well.

We tried to cover every situation, but please provide any other information you think we may need!

Your Signature _____ Date _____