

REQUIRED QUESTIONNAIRE - PLEASE ANSWER AND SUBMIT

Any "YES" responses will require additional documentation or information as they indicate possible income or deductions required to be reported. Any notes to me may be made in the space on the last page.

PERSONAL INFORMATION	YES	NO
Did your marital status change during the year?		
Did your address change during the year?		
Could you be claimed as a dependent on another person's tax return for 2020?		
Did you receive an Identity Protection PIN (IP PIN) letter from the IRS?		
DEPENDENTS	YES	NO
Were there any changes in dependents?		
Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2020?		
Did you have any children under age 19 or full-time students under age 24 at the end of 2020, with interest and dividend income in excess of \$1,100, or total investment income in excess of 2,200.00?		
Do you have dependents who must file a tax return?		
Did you provide over 1/2 the support for any other person(s) other than your dependent children during the year?		
Did you pay for childcare while you worked or were a full time student?		
Did you employ a domestic household employee during the year?		
Did you pay any expenses related to the adoption of a child during the year?		
If divorced/separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?		
HEALTH CARE COVERAGE	YES	NO
Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement), if so, please attach.		
If yes, you must attach your 1095-A form. This form is available in your healthcare.gov account.		
Did you make a contribution to a Health Saving Account (HSA) during the year. This is not the same as an FSA.		
Did you receive any distributions from an HSA during the year?		
INCOME	YES	NO
Did you receive any W2 income during the year? (W2)		
Did you receive any stock options, stock awards or other types of compensation during the year? We are requesting a copy of each paystub for these transactions.		
Did you receive any unemployment benefits during the year? (W2G)		
Did you receive any interest or dividends during the year? (1099INT or 1099DIV)		
Did any life insurance policies mature or surrender during the year?		
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?		
Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?		
Did you have any disability income?		
Did you have any foreign income or pay any foreign taxes?		
RETIREMENT PLANS	YES	NO
Did you receive any Social Security Benefits during the year? (1099-SSA)		

Did you receive a distribution from a retirement plan? (401k, IRA, SEP, etc) (1099R)		
Did you make a contribution to a retirement plan? (5498)		
Did you transfer or rollover any amount from one retirement plan to another? (1099R)		
Did you convert part of all of your traditional, SEP or SIMPLE IRA to a ROTH IRA? (1099R)		
BUSINESSES AND RENTALS	YES	NO
Did you start a business or farm?		
Did you purchase or have a rental property?		
If yes to either above:		
Did you purchase or dispose of any business assets?		
Did you convert any assets to business use?		
Did you convert any business assets to personal use?		
Did receive have any royalties?		
Are you a member in an S Corp, Partnership, Trust or REMIC?		
PURCHASES, SALES AND DEBT	YES	NO
Did you buy or sell any virtual currency?		
Did you buy or sell any stocks, bonds or other investment property? (1099B)		
Did you purchase or sell your primary residence?		
Did you refinance or take out a home equity loan?		
Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?		
Did you have any debts/credit cards cancelled or forgiven?		
Does anyone owe you money which has become uncollectible?		
EDUCATION	YES	NO
Did you receive a distribution from an Education Savings Account or Quialified Tuition Program? (1099Q)		
Did you, your spouse or your dependent incur any tuition epxenses that are required to attend college, university or voational school? (1098-T)		
Did you pay any student loan interest during the year? (1098E)		
Did anyone in your family receive a scholarship of any kind during the year?		
ITEMIZED DEUDCTIONS	YES	NO
Did you incur a loss because of damaged or stolen property?		
Did you incur any out of pocket medical expenses?		
Did you make any charitable contributions? (Cash, Non-Cash, Other)		
Did you pay any mortgage interst during the year		
Did you pay real estate taxes for your primary/secondary home during the year?		
Did you pay real estate taxes on raw/unimproved land during the year?		
Did you make any major purchases during the year?		
ESTIMATED TAX PAYMENTS	YES	NO
Did you make any estimated tax payments during the year?		
Do you expect your income to vary significantly from 2020 to 2021?		
FOREIGN ACCOUNTS	YES	NO
Did you have an interest in or signature or other authority over a financial account in a foreign county, such as a bank account, securities account or other financial account?		
Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust		
Did you receive a gift from a foreign person/estate/entity in excess of \$100,000?		

STANDARDIZED IRS FORMS AND WHERE YOU CAN TYPICALLY LOCATE THEM:

W2 - These are provided by your employer. They are required to be mailed by 1/31 of each year.
1099R - Retirement Income - They are mailed or available online by 1/31. They come from the company managing the account.
1099INT - Interest Income - They are mailed or available online by 1/31. The bank or investment company holding the account is responsible for the form.
1099B - Brokerage Statements - They are mailed or available online by 2/15. The investment company holding the account is responsible for them. They usually take the longest to receive and may have CORRECTED forms mailed after the 2/15 due date
1098 - Mortgage Interest Statement - They are mailed, included in your January statement or available online.
5498-SA - Health Savings Accounts Contributions - They are mailed or available online
1099-SA - Health Savings Account Distributions - They are mailed or available online.
SSA-1099 - Social Security Benefits - They are mailed or available online.
K1 from Investment - Mailed or available online. These are not due until March 15. They may be extended to September by the company preparing the form.
W2G - Gambling Winnings - Usually prepared/delivered at the time of the winnings.
Unemployment Income - Mailed or available online
1099-MISC - Due 1/31. Usually mailed; check with the Payor.
1099-NEC - Due 1/31. Usually mailed; check with the Payor
1099K - Income from third party payors - Mailed or available online.
1099T - Usually available online in the student's account.
1098E - Usually mailed
1099-Q - Distributions from 529 Plan - Usually mailed
1095-A - Healthcare Market Place - Usually available online.