

# Questions — All Taxpayers - Tax Year 2020

(Provide related statements or other documentation.)

Name(s): \_\_\_\_\_ Phone #: \_\_\_\_\_

Email: \_\_\_\_\_

**“You” refers to both taxpayer and spouse. Enter “?” if unsure about a question.**

<b>LIFESTYLE &amp; TAXES</b>	Yes	No	Are either you or your spouse legally blind?			
	Yes	No	Did you pay or receive alimony in 2020? <i>Paid Received \$</i>	<i>Recipient's SSN</i>	<i>Date of divorce or separation</i>	
	Yes	No	Did you purchase health insurance through a public exchange?			
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?			
	Yes	No	Have you paid alternative minimum tax (AMT) in previous years?			
	Yes	No	Did you pay anyone for domestic services in your home?			
	Yes	No	Did you purchase a new energy-efficient car, truck, or van?			
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?			
	Yes	No	Are you a member of the military?	State of residency		
	Yes	No	Were you a citizen of or lived in a foreign country?	Foreign country		
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? Balance exceeds \$50,000			Yes No
	Yes	No	Did you receive an economic impact payment? If so, provide the amount(s).			
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? <i>Designee's name Phone number PIN (any five digits)</i>			
<b>CHILDREN &amp; EDUCATION</b>	Yes	No	Were any children born or adopted in 2020? (Provide statement for other expenses.)			
	Yes	No	Were any children attending college? <i>Year in college</i>	Paid by you: Tuition \$	Student loan interest \$	Books \$
				Paid by student: Tuition \$	Student loan interest \$	Books \$
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?			
			<i>Student</i>	Amount paid \$		
			<i>Name and address of school</i>			
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (add statement if needed)			
<i>Name of provider</i>			EIN or SSN			
<i>Address</i>			Amount paid \$			
Yes	No	Do you have any children who have unearned income of \$1,100 or more?				
Yes	No	Did you make any contributions to a 529 plan in 2020?				
<b>INVESTMENTS</b>	Yes	No	Did you, or will you, contribute any money to an IRA for 2020?	Traditional IRA	Roth IRA	
	Yes	No	Did you roll over any amounts from a retirement account in 2020?			
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?			
	Yes	No	Did you receive any income from an installment sale?			
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2020?			
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2020?			
	Yes	No	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?			
<b>DEDUCTIONS</b>	Yes	No	Did you, or do you plan to, contribute money before April 15, 2021 to a HSA for 2020? If yes, provide details.			
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.			
	Yes	No	Did you pay sales taxes on a major purchase in 2020, such as a vehicle, boat, or home?			
	Yes	No	Did you make any charitable contributions in 2020? If yes, provide details.			
<b>BUSINESS</b>	Yes	No	Did you work from a home office or use your car for business?			
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)			
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?			
<b>HOME</b>	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.			
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.			
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.			
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.			

**State information** Full-year resident Part-year resident Nonresident School district  
States of residence during 2020 and dates Do you rent or own your home? Rent Own