

Office Use Only:
IN _____
DE _____
W2 Summary _____
1099R Summary _____

2020 Tax Return Drop Off Information Sheet

Would you like a call to discuss anything in more detail? Y / N

Ph. (Home): _____ **Ph (Cell):** _____ **Date:** _____

Name: _____

Spouse: _____

Any changes in address, occupation, marital status, or dependents? Y / N

New Address: _____

Date Moved: _____ New Marital Status: _____

New Occupation: TP _____ SP _____

New Dependent or Dependent no longer on your tax return

Name: _____ SSN _____ BD _____

IF YOU HAVE A REFUND DO YOU WANT DIRECT DEPOSIT: Y / N

Same as last year? Y / N If not, enter new banking below.

Bank: _____ RTN _____ Acct # _____

Circle: Checking Savings (include copy/voided check or savings card if new)

DO YOU HAVE ANY EMPLOYEE BUSINESS EXPENSES? Y / N

List amounts for **Union dues, uniforms, tools, supplies, protective clothing, mileage, etc.**

If you wear uniforms do you want to deduct \$250 for washing them? Y / N

Education expenses for you or your dependent? (include Form 1098-T) Y / N

Books and supplies \$ _____

Student loan interest? Y / N \$ _____ or include 1098-E

Daycare expenses for dependent? (include provider statement) Y / N

What is the amount of the Stimulus Recovery check you received:

In 2020 \$ _____ In 2021 \$ _____

RESIDENTIAL ENERGY CREDIT

Did you have any home improvements for the energy credit? Examples are windows, doors, insulation, heat pumps, furnaces, hot water heaters, air conditioning, certain metal and asphalt roofs, biomass stoves, solar or geothermal systems. List item and amount.

Was your insurance obtained through the Healthcare.gov Market Place? Y / N
If Yes, then we need Form 1095-A to complete your tax return.

Do you have any bank accounts or investments held directly in a foreign country?
Y / N Value \$ _____

Charitable Contributions – you can claim up to \$300 without itemizing \$ _____

Alimony paid or received, only if court ordered before 2019 \$ _____

Did you take a premature distribution from retirement plan or IRA? Y / N
If yes do you want it all taxed in 2020 or spread over three years?

We will call for discussion if yes to any of the following: Did you receive any Covid-19 loans or grants? If self employed did you have any Covid-19 sick time for yourself, to care for someone with Covid-19 illness or need to miss working because of childcare needs related to Covid-19 (child home from daycare or school)? Y / N

In 2019, did you have any financial interest in virtual currency such as Bitcoin, Litecoin, etc. ? Y / N

If you make Quarterly estimates enclose the amounts and dates paid.

Ira or Roth contributions for 2020? \$ _____ taxpayer or spouse?

529 Plan contributions for 2020? List owner, child, and amount.

Do you want us to do your Property Tax Rebate if you qualify? Y / N
Please include paid receipts for March and July of 2020

Do you owe any unpaid sales tax for internet purchases? Y / N
If yes, total of untaxed purchases requiring sales tax.

