

2020 Tax Questionnaire

Name: _____ **Sign & Date:** _____

Personal and Dependent Information:

Yes No

- Did your marital status change? _____
- Were there any changes in dependents from the prior year? _____
- Did you or your spouse pay for child care while you or your spouse worked or looked for work? _____
- Do you have any children under age 18 with unearned income more than \$1,100? _____

Healthcare:

- If you or your spouse are self-employed, provide health insurance premiums paid for your entire family: _____
- Did you or your spouse have any transactions pertaining to a health savings account (HSA)? _____
If yes, include all Forms 1099-SA and 5498-SA.

Deductions and Credits:

- Did you or your spouse make any large purchases, such as vehicles, boats, or home remodels? _____
- Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle? _____
- Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition? _____
If yes, include all Forms 1099-Q and 1098-T.

Investments:

- Did you or your spouse own any foreign bank accounts or financial assets? _____
- Did you or your spouse refinance your home or have any debts canceled/forgiven? _____
- Did you or your spouse sell, exchange, or purchase any real estate? _____
- Did you or your spouse sell any securities not reported on Form 1099-B? _____
- Did you contribute or would you like to contribute to an IRA or other retirement plan? _____

Miscellaneous:

- Did you or your spouse pay in excess of \$1,000 in any quarter or \$2,200 during the year for domestic services performed in or around your home to individuals who could be considered household employees? _____
- Did you receive, sell, send, or exchange any financial interest in any virtual currency such as Bitcoin? _____
- Did you receive a Paycheck Protection Program (PPP) loan? _____
- Did you receive an Economic Impact Payment? (\$1,200 stimulus) _____
- Do you require a state income tax return for a state you are not currently residing in? _____
- Did you make any federal or state estimated tax payments? If yes, list payment amounts and dates below: _____

	Federal – Amount Paid	Federal – Date Paid	State – Amount Paid	State – Date Paid
Q1 (4/15/20)	_____	_____	_____	_____
Q2 (6/15/20)	_____	_____	_____	_____
Q3 (9/15/20)	_____	_____	_____	_____
Q4 (1/15/21)	_____	_____	_____	_____