

NAME: \_\_\_\_\_

2020

### Questions

Please circle your answer and include all necessary details and documentation.

#### Personal Information

- |  |     |    |
|--|-----|----|
| Did your marital status change during the year?  | Yes | No |
| If yes, explain: _____   |     |    |
| Did your address change from last year?  | Yes | No |
| Can you be claimed as a dependent by another taxpayer?   | Yes | No |
| Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? | Yes | No |

#### Covid – 19

- |  |     |    |
|--|-----|----|
| Did you receive an Economic Impact Payment (EIP) also known as the stimulus payment as reported on Notice 144? | Yes | No |
| If yes, how much: _____  |     |    |

#### Dependent Information

- |  |     |    |
|--|-----|----|
| Were there any changes in dependents from the prior year?  | Yes | No |
| If yes, explain: _____   |     |    |
| If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? | Yes | No |

#### Purchases, Sales and Debt Information

- |   |     |    |
|---|-----|----|
| Did you start a new business or purchase rental property during the year?                             | Yes | No |
| Did you acquire a new or additional interest in a partnership or S corporation?                       | Yes | No |
| Did you sell, exchange, or purchase any real estate during the year?                                  | Yes | No |
| Did you purchase or sell a principal residence during the year?                                       | Yes | No |
| Did you acquire or dispose of any stock during the year?  | Yes | No |
| Did you take out a home equity loan this year?  | Yes | No |
| Did you refinance a principal residence or second home this year?                                     | Yes | No |
| Did you sell an existing business, rental or other property this year?                                | Yes | No |
| Did you lend money with the understanding of repayment this year and it became totally uncollectable? | Yes | No |

#### Income Information

- |   |     |    |
|---|-----|----|
| Did you have any foreign income?  | Yes | No |
| Did you receive any income from property sold prior to this year?   | Yes | No |
| Did any of your life insurance policies mature, or did you surrender any policies?  | Yes | No |
| Do you expect a large fluctuation in income, deductions, or withholding next year?  | Yes | No |
| Did you have any sales or other exchanges of virtual currencies, or used virtual currencies to pay for goods or services? | Yes | No |

#### Retirement Information

- |  |     |    |
|--|-----|----|
| Are you an active participant in a pension or retirement plan? | Yes | No |
|--|-----|----|

#### Education Information

- |  |     |    |
|--|-----|----|
| Did anyone in your family receive a scholarship of any kind during the year? | Yes | No |
| Did you make any withdrawals from an education savings or 529 Plan account?  | Yes | No |
| Did you cash any Series EE or I US Savings bonds issued after 1989?          | Yes | No |

**Itemized Deduction Information**

Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgement from the donee organization.	Yes	No
Did you use your car on the job, for other than commuting?	Yes	No
Did you work out of town for part of the year?	Yes	No

**Miscellaneous Information**

Did you make gifts more than \$15,000 to any individual?	Yes	No
Did you utilize an area of your home for business purposes?	Yes	No
Did you retire or change jobs this year?	Yes	No
Did you pay any individual as a household employee during the year?	Yes	No
Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?	Yes	No
Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	Yes	No
Did you receive correspondence from the State or the Internal Revenue Service? If yes, please include correspondence.	Yes	No
Did you receive an Identity Protection PIN from the Internal Revenue Service or have you been a victim of identity theft? If yes, attach the IRS letter.	Yes	No
Do you currently Volunteer with the EMS or Fire Department?	Yes	No