

2020 INCOME TAX QUESTIONNAIRE

Please answer each question as accurately as possible. The information you provide will help ensure the accuracy of your tax returns (reducing the likelihood of audits, interest, and penalties), and will assist in ensuring that you receive all deductions for which you are qualified (saving you money).

Taxpayer Name

Spouse Name

Street Address/City/State/Zip Code

Phone #

Email Address

GENERAL

	<u>YES</u>	<u>NO</u>	<u>N/A</u>	<u>NOT SURE</u>
1. Have you had a change in filing status since last year? (ex. married, divorced, widowed, legally separated)	_____	_____	_____	_____
2. Has your address changed from the address shown on last year's tax return?	_____	_____	_____	_____
3. Is your social security number correct on all forms?	_____	_____	_____	_____
4. Did you make any purchases in 2020 for which you did not pay sales tax or paid less than 6.25% sales tax?	_____	_____	_____	_____
5. Did you make any estimated income tax payments for 2020? Please provide dates and amounts	_____	_____	_____	_____
6. Do you have more than \$10,000 in a foreign bank account or did you have foreign income?	_____	_____	_____	_____
7. Are you an elementary or high school teacher?	_____	_____	_____	_____
8. Would you like direct deposit/withdrawal of your 2020 refund/balance? (NOTE: refunds can be split between as many as 3 different accounts, including IRAs)	_____	_____	_____	_____
9. Did you have any debt cancelled (credit card or other) If you received a 1099-C form? (please provide info)	_____	_____	_____	_____
10. Were you or anyone in your family a target of identity theft the past 5 years? If so, were you issued a PIN by IRS?	_____	_____	_____	_____
11. Did you have health insurance coverage through a Marketplace plan and receive Form 1095-A?	_____	_____	_____	_____
12. Did you receive a stimulus advance check, and if so, how much? _____	_____	_____	_____	_____

DEPENDENTS

13. Have you had a change in dependents since last year? (ex. have/adopt a baby, have a child reach age 24, etc.)	_____	_____	_____	_____
14. Did any dependents under age 24 have income? (Please provide information for any who reside with you)	_____	_____	_____	_____
15. Did you pay over \$250 in education expenses to a private Illinois elementary or secondary school?	_____	_____	_____	_____
16. Did you pay into or withdraw from a college savings plan (Sec 529/Coverdell/Educational IRA) or cash Series EE Savings Bonds to pay qualified higher education expenses?	_____	_____	_____	_____

(OVER)

	<u>YES</u>	<u>NO</u>	<u>N/A</u>	<u>NOT SURE</u>
16. Did you, your spouse or a dependent pay college tuition, expenses (not room/board) or interest on a student loan?	_____	_____	_____	_____
17. Could you be claimed as a dependent by another taxpayer?	_____	_____	_____	_____
18. Did you pay for childcare while you worked or looked for work? If so, please list provider name, address, ID# and amount paid _____	_____	_____	_____	_____
19. Please list all dependents you can claim on your 2020 return _____	_____	_____	_____	_____

INCOME

20. Are the figures on your W-2 & 1099 forms correct or reasonable?	_____	_____	_____	_____
21. Did you have any other income not reported on Form W-2 or 1099 (tips, etc.)?	_____	_____	_____	_____
22. Did you engage in any bartering/trading of goods or services during the year?	_____	_____	_____	_____
23. Did you receive any court awards during the year?	_____	_____	_____	_____
24. Did you pay or receive alimony during the year? What was finalization date of divorce decree _____	_____	_____	_____	_____
25. Did you receive a refund from a state tax return last year?	_____	_____	_____	_____
26. Did you receive any unemployment benefits in 2020?	_____	_____	_____	_____
27. Did you receive any social security benefits or disability income in 2020?	_____	_____	_____	_____
28. Did you work in another state or the City of St Louis?	_____	_____	_____	_____
29. Did you or your spouse pay into or intend to pay into an IRA, Roth IRA or retirement plan?	_____	_____	_____	_____
30. Did you receive distributions from a retirement plan/IRA, or rollover any retirement account even if you received no money?	_____	_____	_____	_____
31. Have you ever made non-deductible Traditional IRA contributions? If so, provide details.	_____	_____	_____	_____
32. Did you receive any executor fees or jury duty pay?	_____	_____	_____	_____
33. Do you expect your 2021 taxable income or withholdings to be substantially different from 2020?	_____	_____	_____	_____

DEDUCTIONS

34. Did you purchase, sell, or refinance your principal home, a second home, or take out a home equity loan?	_____	_____	_____	_____
35. Did you purchase any motor vehicles, boats, or home building materials in 2020? If so, please provide documentation showing the sales tax paid.	_____	_____	_____	_____
36. Did you participate in a health savings account (HSA)? If so, please provide documentation (both contrib and withdrawl).	_____	_____	_____	_____
37. Did you pay any medical or long term health care insurance premiums (including Medicare supplements) or expenses?	_____	_____	_____	_____

(PLEASE PROCEED TO PAGE 3)

	<u>YES</u>	<u>NO</u>	<u>N/A</u>	<u>NOT SURE</u>
38. Did you make any charitable contributions or donate a vehicle, boat or other personal property? (provide receipts)	_____	_____	_____	_____
39. Did you pay any student loan interest?	_____	_____	_____	_____
40. Did you pay any mortgage interest on your primary residence or a second residence?	_____	_____	_____	_____

INVESTMENTS/BUSINESS

41. Did you pay any real estate taxes on any property in 2020?	_____	_____	_____	_____
42. Did you sell any stocks, bonds, or real estate this year?	_____	_____	_____	_____
43. Have you been notified that any of your stocks are worthless?	_____	_____	_____	_____
44. Did you receive any income which is exempt from federal taxes? (ex., municipal bond interest)	_____	_____	_____	_____
45. Did you pay a penalty on early withdrawal from a CD?	_____	_____	_____	_____
46. Are you invested in any registered tax shelters?	_____	_____	_____	_____
47. Did you actively participate in the operation of any partnerships, S corporations, LLCs, or rental property for which you are reporting an income or loss?	_____	_____	_____	_____
48. Did you have any business bad debts?	_____	_____	_____	_____
49. Did you keep a mileage log on any vehicle you used for your business or income producing property?	_____	_____	_____	_____
50. Did you participate in the buying/selling or use of virtual Currency (aka cryptocurrency like Bitcoin)?	_____	_____	_____	_____

OTHER

If you answered yes on #8, please provide your bank information or include a cancelled check.

Bank name _____ Routing Number _____ Account Number _____ Checking Savings

If you believe you may qualify for the earned income credit, please ask for the EIC Questionnaire. We cannot complete any return that claims the credit without the questionnaire being completely filled out.

If you believe you may qualify for the Illinois Real Estate Assessment Freeze (over age 65) form P-TAX340 and your total income is expected to be below \$65,000 for 2020 check here []

WE MUST HAVE THE FOLLOWING IF THEY APPLY:

- Brokerage year end tax packet **with 1099** -- including securities sales and cost basis
- HSA statement for contribution and withdrawal
- Documentation from School for tuition paid and **receipts** for any other expenses (books, supplies)
- Form 1095A if you had health insurance through the government exchange

Signature of person completing this form

Date