

TAX YEAR 2020

DROP OFF DATE _____

TAXPAYER: _____ BIRTHDATE _____ SPOUSE: _____ BIRTHDATE _____

DID WE DO YOUR TAXES IN 2019? _____ COPY OF DRIVER'S LICENSE Yes _____ No _____

SS# (IF NEW CLIENT) _____

EMAIL: _____ PHONE # _____

ADDRESS CHANGE? _____

FILING STATUS: SINGLE _____ MARRIED FILING JOINT _____ MARRIED FILING SEPARATE _____
HEAD OF HOUSEHOLD _____ (DOCUMENTATION CHILDREN RESIDE WITH YOU)

DEPENDANTS

NAME _____ DATE OF BIRTH _____ SS# _____ RELATIONSHIP _____
NAME _____ DATE OF BIRTH _____ SS# _____ RELATIONSHIP _____
CHILD SUPPORT RECEIVED \$ _____ ALIMONY RECEIVED/PAID \$ _____ YEAR ALIMONY STARTED _____

DO YOU HAVE ANY ACCOUNTS IN CANADA OR A FOREIGN COUNTRY? YES _____ NO _____
DID YOU RECEIVE, SELL, SEND, EXCHANGE, OR ACQUIRE ANY VIRTUAL CURRENCY YES _____ NO _____

Check List:

- W-2
- UNEMPLOYMENT
- 1099 DIVIDENDS
- 1099 INTEREST
- HEALTH INSURANCE 1095 A (IF IN THE MARKETPLACE)
- SOLD STOCKS 1099 FORM B
- PENSION 1099 FORM R
- SOCIAL SECURITY
- COLLEGE EDUCATION 1098 FORM T
- CHARITY *CARES ACT LETS YOU TAKE FIRST \$300 CAH AS ABOVE THE LINE DEDUCTION*
- VEHICLE REGISTRATION

Do you rent or own a home?

RENT PER MONTH \$ _____ HOW MANY MONTHS PAID IN 2020 _____

Own: Property tax and Mortgage

Did you receive a 2020 Stimulus Check/Economic Impact Payment? Yes _____ No _____

REFUND METHOD: PAPER CHECK _____ DIRECT DEPOSIT _____ SAME AS LAST YEAR _____

DIRECT DEPOSIT INFORMATION: CHECKING _____ SAVINGS _____

BANK NAME _____

BANK ROUTING NUMBER _____

BANK ACCOUNT NUMBER _____