

Please answer all questions

CIRCLE ONE

11. **Have you, your spouse or your dependents taken any college or tech school courses in 2020?** (You must provide the 1098-T from the educational institution) **Yes or No**
12. **Have you paid interest on any student loans in 2020?** **Yes or No**
13. **Have you bought, sold, or had your Home foreclosed on in 2020?** **Yes or No**
14. **Have you had any Cancellation of Debt in 2020?** **Yes or No**
(Such as credit cards, auto loans, forgiveness of debt, repossession, etc)
15. **Have you made any Energy Efficient improvements to your personal residence in 2020?** **Yes or No**
(Such as Solar, Geothermal, Window, HVAC, Doors, Roof, Gas Hot Water Heater, etc.)
16. **Did you make any OUT OF STATE purchases (by phone, internet, mail order, etc) that the seller DID NOT collect sales or use tax on?** (ex: Amazon, Ebay, etc.) **Yes or No**
17. **Did you sell stock, timber, real estate, or any other assets in 2020?** **Yes or No**
18. **Did you receive Social Security benefits in 2020?** **Yes or No**
(if yes please provide your 1099-SSA form)
19. **Did you receive any lottery winnings, jury duty pay or alimony in 2020?** **Yes or No**
20. **Did you have any Virtual Currency (Bitcoin, Litecoin, Ethereum, etc.) or any Foreign Bank Accounts or Trusts?** **Yes or No**
21. **For the year 2020 did you have health insurance for you and your family With the Affordable Care Act also known as Healthcare.gov (1095-A Form is required)** **Yes or No**
22. **How much 1st Stimulus (Economic Impact Payment) did you receive in 2020 \$ _____** (Please Initial) _____
(This is not taxable but must be reported)
23. **How much 2nd Stimulus (Economic Impact Payment) did you receive in January 2021 \$ _____** (Please Initial) _____
(This is not taxable but must be reported)
24. **Did you make any Charitable CASH/CHECK Contributions in 2020** Amount \$ _____ **Yes or No**
(Church, United Way, St. Jude's, or any 501 (c)(3) organization)

Please note in the section below any other items you would like to discuss with your tax preparer:

NOTES:

Our fees are based on the size, complication and forms on your tax return. These fees cannot be accurately determined until the completion of the return. However, if price is a concern, please ask the preparer for a cost estimate prior to the start of your return. The estimate will be within 10% of the final fee. Once the return is started you will be responsible for the fee.

Please sign and date:

Taxpayer: _____ Date: _____

Spouse: _____ Date: _____