

New clients and updates for returning clients:

Taxpayer Name _____ DOB _____ SS# _____ Occupation _____
 Spouse Name _____ DOB _____ SS# _____ Occupation _____
 Address _____ Phone _____ Email _____
 Dependent #1 Name _____ DOB _____ SS# _____ Relationship _____
 Dependent #2 Name _____ DOB _____ SS# _____ Relationship _____
 Dependent #3 Name _____ DOB _____ SS# _____ Relationship _____

Direct deposit: Bank name _____
 Routing # (9 digit) _____ Account # _____

New clients: Copy of 2019 tax return

All clients: Copy of driver's license Taxpayer Spouse
 or issue date of license _____

Checking Savings Other _____
 (Returning client- same as last yr, enter last 4 of acct only)

Request information on potential city tax refund for remote work due to COVID-19

All clients (please answer Yes or No & support every Yes answer):

Yes	No	Qty	Income Items
			W-2
			Interest income- 1099-INT
			Dividend income- 1099-DIV
			Pension, IRA, annuity, etc distribution-1099-R
			Roth conversion Rollover Coronavirus Distrib
			Social Security income- SSA-1099
			Unemployment compensation- 1099-G
			2019 Tax refunds: state, city, or school- 1099-G
			Mutual funds or stocks sold- 1099-B
			Partnership/S-Corp- K-1
			Trust/ Estate- K-1
			Other: Royalty, Pre '19 alimony, Frgiven debt, Rental of personal property, Non W-2 tips, Prizes/awards, Jury duty, Gambling winnings, Foreign income or bank acct.
			Virtual/cryptocurrency- receive, sell, exchange, acquire

Business, Farm & Rental

- Sole Proprietor- income and expenses**
- Rental property- income and expenses**
- Farm- income and expenses**
- Defer portion of self-employment tax to 2021 & 2022?
- Covid related sick leave or family leave
- Mileage (commuting & personal; make, model & yr.)**
- Home office expenses** (N/A for employees)
- Asset purchases or sales**
- PPP/PPP2 loan received

Client Notes:

Yes No Adjustments, Deductions, Credits, & Other Items

- Stimulus payment (first round)- provide bank detail
- Stimulus payment (second round)- provide bank detail
- Estimated tax payments for 2020**
- IRA or SEP 2020 contributions made or to be made
- Roth IRA 2020 contributions made or to be made
- Self-employed health insurance premium
- Student loan interest paid- 1098-E
- Teacher unreimbursed classroom expense (\$250 max)
- Medical expenses not paid by insurance, HSA, or reimbursement, if significant (>7.5% AGI)**
- Home mortgage interest- 1098
- Real estate taxes paid; list if not on 1098
- Charity (cash)- summary of cash, check, credit card**
- Claim \$300 adjustment for charity even w/o itemizing?
- Donation from IRA to charity
- Charity (non-cash)- fair market value of goods donated**
- Appreciated stock donation
- Household employee- Sch H, W-2, taxes paid
- HSA contributions- 5498-SA, W2 or summary
- HSA distributions (all medical?)- 1099-SA
- Child care expenses- list by provider and by child
- College tuition and fees- 1098-T from Univ., etc
- 529 contributions/distributions by beneficiary
- Refinance or buy a new home- closing Statement
- Other: Pre '19 alimony, RMD payments to charity, Long-term care insurance, Electric vehicle purchase, Energy efficiency improvements on home, Gambling losses, OH use tax, OH campaign contribution
- Health insurance premium tax credit (marketplace insurance)- 1095-A only