

Taxpayer Questionnaire 2020

Name(s): _____

“You” refers to both taxpayer and spouse—note “?” if unsure about a question.

LIFESTYLE & TAXES	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you make estimated payments? Please provide information on the following page.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Will there be any significant changes in income or deductions next year?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay or receive alimony this year? Paid/Received \$ _____	Recipient's Name/SS#: _____					
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you have ACA compliant health insurance for you, your spouse, and all dependents for the entire year? MA – provide 1099-HC.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase health insurance through a public exchange? If yes, please provide form 1095-A.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled or forgiven?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were you a citizen of or did you live in a foreign country?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you receive income from a foreign investment, online gambling, or bank account?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have more than \$10,000 in a foreign bank account?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you file for FIN-CEN (Report of Foreign Bank and Financial Accounts)?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have a current will, life insurance, and health care proxy for you and your children over 18?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	At any time during 2020 did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?						
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you buy items online that you need to pay state sales tax on? If so, what were your total taxable purchases? \$ _____							
CHILDREN & EDUCATION	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were any children born or adopted this year? <i>If so, please provide Name/DOB/SS#/gender:</i>						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were any children attending college?	Circle One : Freshman, Sophomore, Junior, Senior	<table border="1"> <tr> <td>Paid by you: Tuition \$ _____</td> <td>Student loan interest \$ _____</td> </tr> <tr> <td>Paid by student: Tuition \$ _____</td> <td>Student loan interest \$ _____</td> </tr> </table>	Paid by you: Tuition \$ _____	Student loan interest \$ _____	Paid by student: Tuition \$ _____	Student loan interest \$ _____
	Paid by you: Tuition \$ _____	Student loan interest \$ _____						
	Paid by student: Tuition \$ _____	Student loan interest \$ _____						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Can you provide proof that you paid tuition and associated costs within the taxable year?						
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay any tuition for you or your spouse's continuing education? Please provide amount paid \$ _____ Additional information:							
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay for child or dependent care so you could work or go to school? <i>(attach statement from provider with EIN & amount paid)</i>							
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have any children who earned more than \$1,100 for the tax year 2020?							
INVESTMENTS	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you or your spouse contribute to an IRA ? (Do not include 401K contributions from you job)						
		Taxpayer: <input type="checkbox"/> Traditional \$ _____ <input type="checkbox"/> Roth \$ _____ Spouse: <input type="checkbox"/> Traditional \$ _____ <input type="checkbox"/> Roth \$ _____						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you roll over any amounts from a retirement account in 2020?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you sell any stock or a rental or an investment property?						
<input type="checkbox"/> Yes <input type="checkbox"/> No	Were you granted, or did you exercise, any employee stock options during 2020?							
DEDUCTIONS	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you make any charitable contributions? Please provide documentation for all deductions.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you contribute to any 529 plans? What state? _____ Amount? \$ _____						
BUSINESS	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you own a business or an interest in a partnership, corporation, LLC, farming activity, or other venture?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes above, did you work from a home office or use your car for business? Please provide additional information.						
HOME	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase or sell a main home during the year? If yes, provide closing statement.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you refinance a mortgage or take a home equity loan? Provide closing statement.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you use HELOC or mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home? If yes above, please provide additional details regarding how any home equity funds were used on a separate sheet.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you pay rent? If so, how much? \$ _____						

RESIDENCY

Full-year resident Part-year resident Non-resident

State(s): _____

Current Address: _____

School District & Township: _____

Do you rent or own your home? Rent Own

Did you move in 2020? **Provide prior address and date of move:** _____

Estimated Tax Payments—Tax Year 2020

<i>Installment</i>	<i>Date paid</i>	<i>Federal</i>	<i>Date paid</i>	<i>State</i>
First		\$ _____		\$ _____
Second		\$ _____		\$ _____
Third		\$ _____		\$ _____
Fourth		\$ _____		\$ _____
Amount applied from 2019 refund?		\$ _____		\$ _____
Total		\$ _____		\$ _____

State Reporting Requirements

Please list any other state filing requirements that pertain to you. Most states require income earned within their borders to be subject to tax. You may have had withholding for those states. If so, please detail this information for us.

State: _____ Income: \$ _____ Source: _____	Withholding: \$ _____
State: _____ Income: \$ _____ Source: _____	Withholding: \$ _____
State: _____ Income: \$ _____ Source: _____	Withholding: \$ _____
State: _____ Income: \$ _____ Source: _____	Withholding: \$ _____

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also obtain banking and credit card information in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

Tax Return Preparation

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance.

Contact Us

There are many events that occur during the year that can affect your tax situation. Preparation of your tax return involves summarizing transactions and events that occurred during the prior year. In most situations, treatment is firmly established at the time the transaction occurs. However, negative tax effects can be avoided by proper planning. Please contact us in advance if you have questions about the tax effects of a transaction or event, including the following:

- Pension or IRA distributions
- Significant change in income or deductions
- Job change
- Marriage
- Attainment of age 59½ or 70½
- Sale or purchase of a business
- Sale or purchase of a residence or other real estate
- Retirement
- Notice from IRS or other revenue department
- Divorce or separation
- Self-employment
- Charitable contributions of property in excess of \$5,000
- Gifts (over \$15,000 to an individual)
- Births or Deaths

I represent to M. Greenwald Associates LLP the answers provided are accurate.

Taxpayer: _____ **Spouse:** _____