

2020 TAX CHECKLIST & QUESTIONNAIRE

Please check here if names, SSN, DOB, etc. (all grayed boxes) stayed the same in 2020.

Name:	SSN:	DOB:	Occupation:
Primary Taxpayer:			
Secondary Taxpayer:			
Current Mailing Address:	Primary Phone:	Cell Phone:	Other:
	Primary Email Address:		
	Secondary E-mail Address:		

Expected Filing Status at the end of 2020:	Other Information:	Primary:	Secondary:
<input type="checkbox"/> Single	Are you blind or disabled?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Married	Are you a full-time student?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Married filing separately	\$3 Election campaign fund?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Widowed	Did you file taxes in 2019?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Head of Household			

Did your marital status change due to divorce, separation, death of a spouse, etc. in 2020? Yes No

Can you or your spouse be claimed as a dependent on someone else's tax return? Yes No

If so, have you or your spouse been claimed as a dependent on someone else's tax return? Yes No

Did your address change during the year? Yes No

Were you, your spouse, or any dependents a victim of identity theft? Yes No

Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)? Yes No

If "Yes," provide Notice CP01A from the IRS.

Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID).

DEPENDENT / QUALIFIED CHILDREN:

Name:	SSN:	Birthdate:	Age:	Relationship:	Mos. In Home:	College Student:	Gross Income:
						Yes / No	
						Yes / No	
						Yes / No	

Did you provide over half the support for any other person during 2020? Yes No

Do you have any dependent children who must file a 2020 Federal or State tax return? Yes No

As a courtesy, dependent children's tax returns are prepared free of charge.

Covid-19 Implications:

Did you receive an Economic Impact Payment (EIP) in 2020? Yes No

If "Yes," provide IRS Notice 1444 from the IRS or bank statements indicating the amount.

Did you experience economic loss due to COVID-19 (loss of job, closed business, etc.)? Yes No

Did you continue to receive wages from your employer even if you were unable to work? Yes No

Did you receive a distribution from a retirement plan (401K, IRA, etc.) due to COVID-19? Yes No

If you own a business, did you continue to pay any employee while they were not working? Yes No

If you own a farm or business, did you receive a Paycheck Protection Program (PPP) loan? Yes No

If "Yes," was the loan forgiven or have you applied for forgiveness? Yes No

If you own a farm or business and were unable to work due to COVID-19, would you have qualified for sick or family leave if employed by someone other than yourself? Yes No

TAXABLE INCOME: (Please check "✓" all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Wages, salary, tips, etc. (W-2s) | <input type="checkbox"/> Alimony received / paid |
| <input type="checkbox"/> Disability Payments (W-2) | <input type="checkbox"/> Business or hobby income / loss (Schedule C) |
| <input type="checkbox"/> Tips <u>not</u> reported on W-2s | <input type="checkbox"/> Capital gains on investments (1099-COMP) |
| <input type="checkbox"/> Lyft, Uber, Airbnb, VRBO, etc. (1099-MISC or K) | <input type="checkbox"/> Rental property income (Schedule E) |
| <input type="checkbox"/> Taxable Interest (1099-INT , Bank Statements) | <input type="checkbox"/> Partnership income (K-1) |
| <input type="checkbox"/> Stock or mutual fund dividends (1099-DIV) | <input type="checkbox"/> Estate income (K-1) |
| <input type="checkbox"/> IRA withdrawals, rollover, or transfer (1099-R) | <input type="checkbox"/> Unemployment or Disability income (1099-G) |
| <input type="checkbox"/> Pension income (1099-R) | <input type="checkbox"/> Gambling / lottery winnings (W-2G) |
| <input type="checkbox"/> Annuity income, payments, or transfer (1099-R) | <input type="checkbox"/> Payments from education accounts (1099-Q) |
| <input type="checkbox"/> Social Security Benefits (SSA-1099) | <input type="checkbox"/> Other: _____ |

ADJUSTMENTS TO INCOME: (Please check "✓" yes or no to each question)

- Did you incur any expense as a direct result of teaching (**Educator Expense Deduction**)? Yes No
- Are you an active reservist or performing artist? Yes No
- Did you own a Health Savings Account (**HSA**) individually or through work? Yes No
- Did you move as a member of the Armed Forces in 2020 (**Moving Expense Deduction**)? Yes No
- Did you contribute to a SEP, SIMPLE or other self-employed qualified plan in 2019? Yes No
- Did you withdraw funds from an IRA, 401(k), etc. prior to 59½ (**Early Withdrawal Penalty**)? Yes No
- Did you pay alimony (**Alimony Adjustment**)? Yes No
- Did you contribute to an Individual Retirement Account (IRA) or Roth IRA in 2020? Yes No
- Did you pay interest on a student loan (**Student Loan Interest Deduction**)? Yes No
- Did you receive a Health Insurance Marketplace Statement (**1095-A**) in 2020? Yes No
- Did you pay quarterly estimated taxes last year? Yes No
- If yes, amount paid: 1st Quarter: Fed: _____ St: _____ 2nd Quarter: Fed: _____ St: _____
 3rd Quarter: Fed: _____ St: _____ 4th Quarter: Fed: _____ St: _____

TAX CREDITS & MISC.: (Please check "✓" yes or no to each question)

- Did you sell, purchase, or refinance your primary residence in 2020 (**1099-S**)? Yes No
- Did you install a geothermal, solar, or wind energy system to your primary residence in 2020? Yes No
- Did you make energy efficiency improvements to your primary residence in 2020? Yes No
 If so, please list the amount of Lifetime Limitation used (if any) prior to 2020? \$ _____
- Did you make any payments to a licensed dependent daycare provider in 2020? Yes No
- Did you adopt a child in 2020 or have adoption credit carried over to 2020? Yes No
- Did you pay education tuition and fees for you, your spouse or dependent child in 2020? Yes No
 If so, please provide copy of your **1099-T**, Tuition Statement
- Did you at any time during 2020 receive, sell, send, exchange, or acquire any financial interest in any virtual currency? Yes No
- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country? Yes No
- Did you pay any foreign income or investment tax? Yes No

ITEMIZED TAX DEDUCTIONS: (Please check "✓" all that apply)

Please note that the standard deduction for 2020 is \$12,400 for single filers and \$24,800 for joint filers. Your itemized deductions should exceed these amounts to complete this section.

- Medical and Dental Expenses (> 7.5% AGI)
Health Insurance / Medicare
Long-Term Care Insurance
State and Local Taxes
New Motor Vehicle or Boat Sale Tax
Real Estate Property Taxes
Home Mortgage Interest / Points Paid
Mortgage Insurance
Gifts to Charity (Documented)
Casualty or Theft Losses
Other:

Did you itemize your tax deductions last year? Yes No

Did you contribute to a 401(k), 403(b), Simple IRA or other company retirement plan in 2020? Yes No

WI STATE RETURN: (Please check "✓" yes or no to each question)

- Did you purchase / renew a WI special tax-deductible license plate in 2020?
Did you purchase (through internet, etc.) items where WI sales tax is due but not paid?
Did you work in or receive income from a state other than WI?
Did you pay state income tax to a state other than WI in 2020?
Did you pay rent in 2020?

Heat included:

Heat not included:

- Did you pay WI state property tax for anyone other than yourself?
Did you receive the WI Homestead Credit in 2019 or expect to receive it in 2020?
Did you contribute to WI's 529 college savings program (Tomorrow's Scholar or EdVest)?

OTHER: (Please check "✓" yes or no to each question)

- Were you ever audited or received any correspondence by the IRS?
Were you ever delinquent in paying your taxes or ever modified your tax return after it was filed?
Do you have children with investment income greater than \$2,200 (Kiddie Tax)?
Did you or your spouse make or receive gifts of over \$15,000 in 2020?
Did you file bankruptcy, foreclose, or have any debt forgiven or cancelled in 2020? (1099-C)
Did you turn 72 prior to December 31st of 2020 (RMD)?
Do you want direct deposit of your refund?

If "Yes", please provide voided check or deposit slip.

2021 TAX PLANNING: (Please check "✓" yes or no to each question)

- Do you plan to enroll in the Affordable Care Act health exchanges 2021?
Will you file bankruptcy, have any lender forgive / cancel debts (credit cards, etc.) in 2021?
Do you and / or your spouse plan to retire or have significant life / income changes in 2021?
Do you expect to undergo any major-medical expenses in 2021?
Will any dependent children turn 17 or be entering college or vocational school in 2021?
Will you turn 72 prior to December 31st of 2021? (RMD)

Notes:

REQUIRED DOCUMENTATION NEEDED TO COMPLETE TAX RETURNS:

- Four red checkboxes with blank lines for documentation requirements.