

2020

Corwin & Jenkins, CPAs Inc.
35000 Chardon Road #100
Willoughby Hills, OH 44094
440-954-3399 phone
216-372-3188 text
cpa@corwinjenkins.com email

MANDATORY PAGE

Your Information:

Name _____
Date of Birth _____
Occupation _____

REQUIRED BY THE STATE:

Driver's license #? _____
Issuing State: _____
Issue Date: _____
Expiration Date: _____

Spouse's Information

Name _____
Date of Birth _____
Occupation _____

REQUIRED BY THE STATE:

Driver's license #? _____
Issuing State: _____
Issue Date: _____
Expiration Date: _____

Marital Status at 12-31-20: Single Married Divorced Legally Separated Widowed

Exact City of Residence _____ (NOT Your Mailing Address)

Is this a Township? _____

School District Name _____

If you moved during the year, provide us with the date you moved: _____

Best Way to reach you?

- What is your email address? _____
- Daytime Phone # _____
- Evening Phone # _____
- Cell Phone # _____ Can we text you on your cell? Yes No

When your taxes are complete, you would like to:

- Pick them up
- Have them mailed to you
- Pdf (log in to our online portal)
- Other _____

Have you signed and included the 2020 engagement letter? Yes No

More questions on the back . . .



Yes No

- Did you receive the two IRS stimulus payments? Please provide us with the letters you received from the White House or let us know how much you received?

First round (\$1,200 per person plus \$500 per child age 16 or under) _____

Second round (\$600 per person plus \$600 per child age 16 or under) _____

- Did you make any charitable contributions by cash or check in 2020? Even if you don't itemize, you may claim up to \$300. If yes, how much? _____

- At any time during 2020 did you receive, sell, exchange or otherwise acquire any financial interest in **virtual currency** (such as Bitcoin, Litecoin or XRP)? If yes, we need to know more!

- During 2020 did you make a Coronavirus related withdrawal from a retirement account? (See our cover letter for the definition of Coronavirus-related withdrawal).

If yes, the distribution amount will be reported as income over a 3 year period (2020-2022).

Would you instead like to choose to include all of it as income in 2020? _____

Are you considering returning any of the funds to the retirement account? _____

ESTIMATED TAX QUESTIONS:

If you made any estimated tax payments for 2020, please fill in the dates and amounts below:

	<u>Federal</u>		<u>State</u>		<u>City</u>	
	<u>Date</u>	<u>Amount</u>	<u>Date</u>	<u>Amount</u>	<u>Date</u>	<u>Amount</u>
1 st 2020 Estimate	_____	_____	_____	_____	_____	_____
2 nd 2020 Estimate	_____	_____	_____	_____	_____	_____
3 rd 2020 Estimate	_____	_____	_____	_____	_____	_____
4 th 2020 Estimate (even if paid in 2021)	_____	_____	_____	_____	_____	_____
Total Paid for 2020	=====	=====	=====	=====	=====	=====

IMPORTANT QUESTIONS:

Yes DEPENDENT INFO - Mark if you . . .

- Can you be claimed as a dependent by someone else for 2020?
- Had any additions to your household (new dependents) in 2020? List additions:
Full Name _____ DOB _____ SS# _____
Full Name _____ DOB _____ SS# _____
- Want us to remove any of your dependents? Children over age 19 and not in school, or children over age 24 may no longer qualify as dependents. If you're not sure, be sure to give us your child's name, dates he/she was in school in 2020 and how much money he/she earned in 2020.
Name _____ School Dates _____ Earnings _____
Name _____ School Dates _____ Earnings _____
- Have any physically or mentally disabled children?
- Have any dependent children with interest and dividend income or capital gains totaling in excess of \$1,100? If so, include all information for a separate return.

Yes GENERAL INFO - Mark and/or **INCLUDE PAPERWORK** . . .

- Did you have any **foreign** income or financial assets in a foreign country, such as a bank account, securities account, or rental property? (if yes, and your aggregated balance of \$10,000 or more at any point during the year...then we need to talk!)
- Did you transfer your home or other significant property to your child or other family member in 2020?
- Did you or your spouse make total **gifts** to an individual other than your spouse that totaled \$15,000 or more?
- Did you **refinance** your home in 2020? If so, were the proceeds used to payoff personal debt, purchase something, improve your home, or something else? _____

INCOME:

- Yes** **INCOME** - Mark and INCLUDE PAPERWORK if you had
- Wages** (attach all W-2s)
 - Interest** or **Dividend** income (attach all 1099s)
 - Alimony** income. If so, we now need the date of your divorce (MM/YY)_____.
 - Business** income (attach sales and expense summary from sole proprietorship)
 - Any business income or payments received through credit card transactions from your customers (attach 1099-Ks)
 - Stock** sales (attach broker 1099-B package)

 - IRA, pension, annuity, or other **retirement** distributions (attach all 1099-Rs)
 - Rental** or **Royalty** income and expense, per property
 - Partnership** or **S Corporation** income (attach all K-1s)
 - Estate** or **trust** income (attach all K-1s)
 - State** or **City refunds** from prior years (attach 1099-G)
 - Unemployment** compensation (attach Form 1099-G)
 - Social Security** benefits or **Disability** income (attach Form SSA-1099)

 - Withdrawals from or payments to an **HSA** (Attach Details)
 - Unreported **tip** income of \$20 or more in any month not included in your W-2 from your employer
 - Gambling** winnings (attach Form W-2G). Also, attach win/loss statement from casino.

 - Distributions from an Education Savings Account or a **529 Plan**. (Attach list of college expenses the withdrawal was used for)
 - Had any other income not mentioned above (please provide all relevant documentation)

DEDUCTIONS:

- Yes** **DEDUCTIONS & CREDITS** - Mark and INCLUDE PAPERWORK if you
- Paid **alimony**. Recipient's Name _____ SS# _____
Amount Paid _____ Date of your divorce (MM/YY) _____
 - Made any **traditional IRA** contributions for 2020? If paid (or will be paid by April 15, 2021), list amounts: Taxpayer \$ _____ Spouse \$ _____
 - Made any **ROTH IRA** contributions for 2020? If paid (or will be paid by April 15, 2021), list amounts: Taxpayer \$ _____ Spouse \$ _____
 - Paid student loan interest (attach Form 1098-E)
 - Had **tuition** expenses for college, or vocational school (attach Form 1098-T because we need the schools' tax ID#). Please include tuition amounts you paid or that which your student loans paid in 2020.
 - Made contributions to an Ohio college tuition **Sec. 529 Plan** (attach paperwork)
 - Had **medical** expenses for 2020 (attach a summary of what you paid, not the receipts)
 - Paid **health insurance** or **long-term care** premiums (attach list of payments)
 - Paid **mortgage** interest on your main home or a 2nd home (attach Form 1098)
 - Paid **home equity interest**. Unfortunately, this interest is generally no longer deductible unless the funds were used to build an addition onto your home. Let us know!
 - Paid **real estate taxes** (attach list of payments or Form 1098)
 - Made **charitable contributions**. Provide a list of recipients with amounts.
 - Gave non-cash contributions. If market value over \$500, please provide us with dated receipts, a list of items donated, and amounts.
 - Incurred **Child Care** costs (MANDATORY INFORMATION NEEDED)
Child Care Provider _____
Tax ID # or SSN: _____ Amount Paid _____
For which child? _____
 - Used your car for your self-employed business? If so, we need:
Business miles 2020: _____ **Total miles** 2020: _____
(Car used for your job if you're an employee is no longer deductible.)
 - Had any other deductions or credits not mentioned above that you want us to consider (please provide all relevant supporting documentation)

IF YOU'RE GETTING A REFUND:

Yes

- If the result of your 2020 taxes is a refund, do you want the amount to be applied to your 2021 estimated tax (instead of being refunded)?
- If you want your refund, would you like to get an old-fashioned **paper** check OR
- Would you like it **directly deposited** into your checking, savings, or IRA account or a combination of the three? If you want *DIRECT DEPOSIT* and your information is not the same as last year we need a voided check **OR** the information below:

Bank Name _____

Routing Number _____

Account Number _____

Type of Account (*CIRCLE ONE*) *Checking* *Savings* *IRA*