NICK J. STORHAUG, CERTIFIED PUBLIC ACCOUNTANT

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New Client Information

Taxpayer:______________________Occupation:________________SS#_______________DOB:_____________

Spouse:______________________Occupation:________________SS#_______________DOB:_____________

______Single ________Married filing Separate

______Married ________Head of Household

Address:____

City, State, Zip:____

Home Phone:_________________________Cell Phone:_____________________________

Work Phone:____________________ Email:_________________________________

Dependents - Please let us know if your dependent did not live with you for the entire year

NAME	DATE OF BIRTH	SOCIAL SECURITY #	RELATIONSHIP
________________	__________	__________________	_____________
________________	__________	__________________	_____________
________________	__________	__________________	_____________
________________	__________	__________________	_____________

Direct Deposit Information

Bank Name:________________________ Checking______ Savings_______

Routing #:___________________________ Account #:__________________________

Nick Storhaug, CPA

TAX CLIENT INTERVIEW FORM   TAX YEAR 2020

Driver's License	**Issue Date**	**Expiration Date**	**Number**	**State**
Taxpayer	________	________	______________	_____
Spouse	________	________	______________	_____

Can another taxpayer claim you as a dependent on their return? If yes, did they? __________

Was your home in the United States for more than half of the tax year? __________

State of Residence ________________________Did you live there the entire year? ______________________

If no, list other states you resided in with dates____

Did your marital status change in the tax year? __________

Did you pay alimony or spousal support? $__________ Person paid_________________________SS#___________

Did you receive alimony? __________ Amount$__________ Year Started__________

Do you have childcare expenses? _______________ **Please provide statement from the childcare provider**

Do you have a flex plan? _____________________________

Do you pay student loan interest? ______________ **provide statement**

Did you, your spouse, or dependent attend and pay for College? __________ **provide 1098-T & paid invoice from school**

Do you contribute to a Retirement Plan, IRA, or Roth outside of employer? _____________________

Do you make federal or state estimated payments? ____

Did you receive a 1099K? __________ (Do you sell items and get paid with a credit card or PayPal – i.e. eBay, Craft shows, Flea markets, Small Business?)

Do you have a foreign bank account valued at over $10,000? __________

Did you transfer or was a home transferred from parent to child? __________

Did you or your spouse become disabled or legally blind during the tax year? __________

Did you receive combat pay? __________

Were you notified by the IRS or State of any changes in a prior year's tax return? __________ **Bring in notice**

Do any of your dependents have income over $2,200 from interest or dividends? _________

Was your mortgage or credit card forgiven in foreclosure or restructure? (Bankruptcy)__________

Did you receive, sell, send, exchange, or acquire any financial interest in any virtual currency (ex: bitcoin)? ___________

Do you have an HSA and have you used it? If funds used, 1099-SA must be provided to our office. ________________

Did you purchase your health insurance through the marketplace____________ (Need form 1095 A)

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Client Statement for Files Regarding Stimulus Check

In 2020 most taxpayers received a Federal "Stimulus Check" or "Economic Impact Payment" from the Federal government for the 2020 tax year. As your tax preparer we are required to reconcile your payment to determine if you are owed any additional payment, but it is difficult for us to determine any amount you may have received.

You should have received Notice 1444 showing the amount of the check, but many people have misplaced this letter, so we are asking you to provide us with the amount below. Thank You

___ I received and have attached a copy of Form 1444

___ I do not have a copy of Form 1444, but I did receive a stimulus check in the amount of $ ______________

___ I did not receive a stimulus check

____
Signature

____

Date

For your convenience, please review our list of tax information/documents commonly needed to prepare tax returns.

- Amounts received from Federal Stimulus Check/Economic Impact Payment or provide us with IRS Notice 1444 if you have received it. This is **required** to prepare your tax return.
- Information on any transactions dealing with virtual currency
- Copy of driver's license for you and your spouse
- Any changed address or changed contact information.
- Social security number and date of birth for any new dependent
- W-2 forms for wages
- W2G form for gambling winnings
- 1099 forms for miscellaneous income
- Form SSA - 1099 for Social Security income
- Form 1099-SA if you have used any funds from your HSA
- Year-end statements from IRA's and mutual funds
- 1095-A form if you have health insurance through the Market Place
- K-1 forms from partnerships, corporations, and estates
- Rental or self-employment income and expense
- Purchase, trade, and sale information for any business assets
- Any other statements of income
- Records of estimated taxes paid
- Property tax statements
- 1098 forms for mortgage interest
- 1098E form for student loan interest
- Donations to charity (there is a new above the line deduction for cash donations up to $300).
- Out of pocket medical expenses (if you itemize)
- 1098T form for amounts paid for higher education
- Childcare provider's name, address, SS number or EIN/TIN and amount paid
- Signed 8332 form if you are the noncustodial parent claiming a dependent