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2019

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 12-31-19: 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: _____

What is your email address? _____

Daytime Phone # _____ Evening Phone # _____

Cell Phone # _____ Can we text you on your cell? Yes No

Circle the best way to reach you: Email, Daytime phone, Evening phone, Cell phone, Text

When your taxes are complete, you would like to:

- Pick them up
- Have them mailed to you
- Pdf uploaded to secure website
- Other _____

Have you signed and included the 2019 engagement letter? Yes No

IMPORTANT QUESTIONS:

Yes DEPENDENT INFO - Mark if you . . .

- Can you be claimed as a dependent by someone else for 2019?
- Had any additions to your household (new dependents) in 2019? 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 2019 and how much money he/she earned in 2019.

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!)
- At any time during 2019 did you receive, buy, or spend **virtual currency** (such as Bitcoin)?
- Did you transfer your home or other significant property to your child or other family member in 2019?
- 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 2019? If so, were the proceeds used to payoff personal debt, purchase something, improve your home, or something else?

IMPORTANT INCOME QUESTIONS:

- 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)

IMPORTANT DEDUCTION QUESTIONS:

- 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 2019? If paid (or will be paid by April 15, 2020), list amounts: Taxpayer \$ _____ Spouse \$ _____
 - Made any **ROTH IRA** contributions for 2019? If paid (or will be paid by April 15, 2020), list amounts: Taxpayer \$ _____ Spouse \$ _____
 - Paid student loan interest (attach Form 1098-E)
 - Paid **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 2019.
 - Made contributions to an Ohio college tuition **Sec. 529 Plan** (attach paperwork)
 - Had **medical** expenses for 2019 (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 _____
Federal ID # _____ Amount Paid _____
For which child? _____
 - Used your car for your self-employed business? If so, we need:
Business miles 2019: _____ **Total miles** 2019: _____
(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)

ESTIMATED TAX QUESTIONS:

If you made any estimated tax payments for 2019, 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>
Last 2018 Tax Payment made in 2019	_____	_____	_____	_____	_____	_____
1 st 2019 Estimate	_____	_____	_____	_____	_____	_____
2 nd 2019 Estimate	_____	_____	_____	_____	_____	_____
3 rd 2019 Estimate	_____	_____	_____	_____	_____	_____
4 th 2019 Estimate (Can be in 2020)	_____	_____	_____	_____	_____	_____
Total Paid for 2019	_____	_____	_____	_____	_____	_____

IF YOU'RE GETTING A REFUND:

Yes

- If your result is a refund for your 2019 taxes, do you want the amount to be applied to your 2020 estimated tax (instead of being refunded)?
- If you want your refund, would you like to get an old-fashioned **paper** check?
- 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*