



Tax Year 2020 Questionnaire

Name: _____

Best Phone # _____

Preferred E-mail Address: _____

Please review the following questions.

Please bring in supporting documents.

FAMILY INFORMATION	Circle Yes or No
1. Did your marital status change during the year?	YES NO
2. Did your address change from last year?	YES NO
3. Was there a change in dependents from the prior year?	YES NO
4. Do you have any children under age 19 or full-time student with unearned income in excess of \$2,200?	YES NO
5. Did you provide over half the support for any other person(s) other than your dependent child(ren) this year?	YES NO
6. Did you pay for child care while you worked or looked for work? Amount of dependent care paid by your employer? _____	YES NO
7. Do you want your tax refund direct deposited? Routing Number _____ Acct Number _____	YES NO

INCOME INFORMATION	Circle Yes or No
1. Did you receive any income from wages or salary? Provide W-2	YES NO
2. Did you receive any income from Self- Employment? Provide 1099-Misc/1099-NEC See page 4 for organizing information	YES NO
3. Did you receive any income from the sale of real or personal property?	YES NO
4. Did you make any withdrawals from a retirement plan? Provide 1099-R Were any Withdrawals due to COVID?	YES NO YES NO
5. Did you receive any interest income? Provide 1099-INT	YES NO
6. Did you receive dividend income or sale/trade stock? Provide 1099-DIV/1099-B	YES NO
7. Did you receive any income from a Rental or Farm? Provide 1099-Misc (HUD-1 if new rental) See Page 4 for organizing information	YES NO
8. Did you receive any income from a trust, estates, partnership or S-Corp? Provide K-1's	YES NO
9. Did you receive Social Security benefits during the year? Provide 1099-SSA	YES NO
10. Did you receive any Unemployment Benefits? Provide 1099-G	YES NO
11. Did you receive any state refund? Provide 1099-G	YES NO

PLEASE COMPLETE ALL THREE PAGES

12. Did you receive any awards, prizes, hobby income, gambling or lottery winnings, tips, jury duty, online sales, inheritance, barter income or any other income not listed. Provide 1099-MISC or W-2G for gambling winnings including proof of any losses. YES NO
13. Did you have any debts canceled or forgiven this year? Provide 1099-C/1099-A YES NO
14. Did you have any foreign income or any signature authority over a financial account such as: bank account, securities account, brokerage account in a foreign country? AND/OR Hold any foreign financial accounts or assets? YES NO
15. Do you own any Virtual Currency at any time during 2020? YES NO
16. Did you receive an Economic Impact Payment (Stimulus) EIP 1 _____ YES NO
EIP 2 _____

MEDICAL INFORMATION	Circle Yes or No
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|--|--------|
| 1. Did you pay out-of pocket medical expenses or premiums? | YES NO |
| Health insurance (excluding Medicare) _____ Prescriptions _____ | |
| Doctors, Dentists, Hospitals, etc _____ Medical Miles _____ | |
| Lodging _____ Qualified Long Term Care (you) _____ (spouse) _____ | |
| 2. Did you make any contributions to an HSA? Or Idaho Medical Savings account? | YES NO |
| 3. Did you enroll in the Marketplace for health care coverage? Provide 1095-A | YES NO |
| 4. Did you receive insurance from your employer? Provide 1095-B's and 1095-C's | YES NO |

ADJUSTMENTS AND DEDUCTIONS	Circle Yes or No
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|---|--------|
| 1. Did you contribute to an IRA, SIMPLE, SEP, ROTH, or any other retirement plan? | YES NO |
| 2. TEACHERS ONLY: Did you have any educator expense? Amount _____ | YES NO |
| 3. Did you make any charitable cash contributions? Amount _____
Total paid to any Idaho Schools, etc _____ | YES NO |
| 4. Did you make any non-cash contributions? Total _____
Total to Idaho Youth and Rehab facilities and Educational Entities _____ | YES NO |
| 5. Did you pay any student loan interest? Total _____ | YES NO |
| 6. Did you have any educational expenses during the year that you paid on behalf of yourself, your spouse, or your dependent(s)? Provide 1098-T and account print out from educational institution. | YES NO |
| 7. Did you incur moving costs as a result of Active Military Duty? | YES NO |
| 8. Did you pay or receive alimony? | YES NO |
| 9. Did you purchase or refinance a home in 2020? Provide HUD-1 statement | YES NO |
| 10. Did you own your own home? Provide 1098
1 st Mortgage Interest _____ 2 nd Mortgage (HELOC) _____
Amount of 2 nd not used to improve property _____ Property taxes paid? _____
Irrigation tax _____ Points _____ Mortgage Insurance Premiums _____ | YES NO |
| 11. Did you suffer any casualty or theft loss due to a Natural Disaster? | YES NO |

PLEASE COMPLETE ALL THREE PAGES

MISCELLANEOUS QUESTIONS

Circle Yes or No

- | | | |
|---|-----|----|
| 1. Can anyone claim you as a dependent? | YES | NO |
| 2. Do you pay any individual to work in your home on a regular basis? | YES | NO |
| 3. Did you work or live out of Idaho for any part of the year? | YES | NO |
| 4. Did you make any out-of-state purchases without paying sales tax? | YES | NO |
| 5. Did you receive any correspondence from the IRS or state? | YES | NO |
| 6. Did you receive an Identity Protection PIN from the IRS or have you been a victim of identity theft? Provide IPIN from IRS if applicable | YES | NO |

ESTIMATED TAX PAYMENTS

Date	Amount	Date	Amount
Due 7/15/20	_____	Due 9/15/20	_____
Due 7/15/20	_____	Due 1/15/21	_____

Did you make any state estimated Tax Payments? YES NO

SELF-EMPLOYED AND RENTAL WORKSHEET ON BACK PAGE**Privacy Policy**

- We collect non-public information about you from the following sources:
 - Information we receive from you
- Information about your transactions with us or other (ie financial institutions)

Unless directed by you, we deny access to your personal and account information to anyone other than our staff. Without your permission, we do not disclose any non-public personal information about you to anyone, except when legally required or permitted in connection with fraud investigations and litigation. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal information. Our policy applies to all current and former clients.

Robin Gervais

SELF-EMPLOYED AND RENTAL WORKSHEETS

Self-Employed Worksheet

Gross Receipts _____

(Provide 1099-Misc and 1099-K's)

Advertising _____

Bank Fees _____

Communication _____

Health Insurance _____

Interest Paid _____

Legal & Prof Fees _____

Liability Insurance _____

Meals _____

Office Supplies _____

Rent Expense _____

Repairs _____

Supplies _____

Subcontractors _____

Taxes and License _____

Travel _____

Utilities _____

Wages _____

Asset Purchases _____

Other _____

Rental Property

Property Address _____

Rental Income _____

Advertising _____

Bank Fees _____

Insurance _____

Legal & Prof Fees _____

Management Fees _____

Mortgage Interest _____

Property Taxes _____

Repairs _____

Supplies _____

Utilities _____

Yard Maintenance _____

Asset Purchases _____

Other _____

Vehicle Expense

Make of Vehicle _____

Total Miles _____

Bus Miles _____

Business Use of Home

Square Foot of Office _____

Total Sq Foot of Home _____

Daycare Hours _____ Rent _____

Insurance _____ Utilities _____

Repairs _____ Maint _____