



Please make sure to answer these questions and bring this to your appointment.
If you are unsure about any of these questions, please ask us!

Yes No

Grid for Yes/No answers

Grid for Yes/No answers

Grid for Yes/No answers

Grid for Yes/No answers

Grid for Yes/No answers

Grid for Yes/No answers

Grid for Yes/No answers

Grid for Yes/No answers

2020 Changes

Did you receive a Cares Act stimulus payment? If so how much?
Did you receive a 2nd round stimulus payment? If so how much?
Please provide IRS Notice 1444A (1st stimulus notice) & 1444B (2nd stimulus notice)
Did you receive or request a Covid-19 related distribution from any retirement account during 2020?
Did you defer your required minimum distributions due to Covid-19 for 2020?
Did you donate \$300 or less in cash payments to eligible charities? Please provide documentation.

- 1. If you are due a refund, would you like it direct deposited into your bank account?
Bank Name _____ Routing Number _____
Account Number _____ Is it a savings account? Yes No
2. If you have a balance due, would you like it electronically withdrawn from your bank account?
3. Were you legally married as of December 31, 2020?
4. Are you considered unmarried and provide more than 50% of support for a child or dependent who lived with you over half the year? If so, please list name of child or dependent _____
5. Are there any changes to the children you may claim as dependents for 2020?
Please provide proof of residency or Form 8332
6. Did you purchase your health insurance coverage from the ACA Marketplace? Attach Form 1095-A
7. Did you move during 2020?
8. Did you earn income in a state other than the state you live in?
9. Did you receive any notices from the IRS or the state taxing agency? If yes, please attach.
10. Did you receive any type of prize, award, or gambling winnings?
11. Did you receive jury duty or alimony pay?
12. Did you receive, sell, send, exchange, or acquire any financial interest in any virtual currency?
14. Did you make any gifts to any one person in 2020 in excess of \$15,000?
15. Did you pay wages to any household employees (such as a nanny)?
16. Did you have any debts forgiven or cancelled in 2020?
17. Did you pay any college tuition during 2020? How much was paid \$ _____ (attach form 1098-T)
18. Did you pay any private school tuition cost for Grades K -12? (Provide documentation from the school)
19. Did you purchase, sell, or refinance your house? If yes, please provide the closing information.
20. Do you have any home equity loans where any proceeds were not used to improve your residence?
21. Did you have any foreign assets during the year?
22. Did you make any purchases in 2020 from out-of-state companies that did not charge sales tax?
If yes, please provide the amount of purchases subject to your state's Use Tax: \$ _____
23. Are you expecting any significant changes to 2021's income, deductions, or credits?
24. Do you have any tax or tax planning questions that you would like to discuss with us?
25. Do you have an identity protection PIN used to file your return due to identity theft?
Please provide a copy of the letter with your PIN number on it.

Business and Rental Questions (skip this section if not applicable)

- 1. Did you start a new business or purchase any rental property during 2020?
2. Did you purchase (or begin using) any assets for your business?
3. Did you sell (or stop using) any assets for your business?
4. Did you make any business payments that require you to issue 1099s? (Not needed for rentals)
5. If yes, have you filed all 1099s?
6. Do you have all documentation to support all business expenses (Schedule C)
7. Do you have all documentation to support all rental expenses (Schedule E - If applicable)
8. Did you spend 250 or more hours of rental service activity? If so, please attach log.
9. Do you have mileage log for business mileage? If so, please attach log.

Taxpayer Signature _____

Spouse Signature _____

Please provide a copy of your current Driver's License or State ID with your tax documents to avoid any delay in receiving your tax refund.

Table with 5 columns: Taxpayer/Spouse, State, License #, Issue Date, Expiration Date



Information Checklist for 2020

If you wish, you may use this checklist to help gather all of your information

Yes N/A

Table with 2 columns (Yes, N/A) and 15 rows for Income section.

Income

- Salaries and Wages (Form W-2 and final paystub)
Gambling Income (Form W-2G)
Retirement Plan Distributions (Form 1099-R)
Social Security Income (Form SSA-1099)
Railroad Retirement Income (Form RRB-1099-R)
Interest Income (Form 1099-INT)
Dividend Income (Form 1099-DIV)
Sales of Stocks and Bonds, Bartering, and Stock Options (Form 1099-B, 3921, and 3922)
Unemployment Income (Form 1099-G)
Other Income (Form 1099-MISC)
Tuition Plan Distributions (Form 1099-Q)
Health Savings Account Distributions (Form 1099-SA)
Proof of residency for children under 17 that qualify for Child Tax Credit or Form 8332
Income from Estates, Trusts, Partnerships, or 'S' Corporations (Schedule K-1)
Detailed Mileage Log or print out
Other Sources of Income (Please list):

Table with 2 columns (Yes, N/A) and 5 rows for Deductions and Credits section.

Deductions and Credits

- Student Loan Interest Paid (Form 1098-E)
Contributions to a Traditional IRA
Contributions to a Health Savings Account (HSA)
College Tuition paid for you or your dependents
Child Care Expenses for children under age 13

Table with 2 columns (Yes, N/A) and 7 rows for Itemized Deductions section.

Itemized Deductions

- Medical, Dental, and Vision expenses, and health and long-term insurance premiums
Miles driven and lodging for seeking medical care
Prescriptions, etc.
Property and other State or Local Taxes
Mortgage Interest and Mortgage Insurance Premiums (Form 1098)
Donations to charity
Casualty or theft losses
Gambling Losses (to the extent of winnings)

Table with 2 columns (Yes, N/A) and 4 rows for Wisconsin Deductions section.

Wisconsin Deductions

- Property Taxes or Rents paid for a Wisconsin residence
Contributions made for Private School Tuition (Grades K-12)
Contributions made to an EdVest college savings plan.
Health Insurance Premiums Paid, excluding any amounts paid under a 'flexible spending' or cafeteria' type plan