

Name: \_\_\_\_\_

1	Please confirm your address	
2	Did your marital status change before the end of the year?	
3	What is your occupation / job title?	
4	Please provide cell phone numbers for all taxpayers	
5	May we text you with questions on the cell numbers provided?	
6	Please provide e-mail addresses for all taxpayers	
7	Please list your dependents names (those you intend to claim)	
8	Child or Dependent care expenses? Provider's name, child cared for, address of services, ID Number, and amount.	
9	Did you provide more than half the cost of maintaining a home for the dependents on your return?	
10	Do you provide a home (or help support anyone) not listed as a dependent (explain)?	
11	Did you or a dependent have tuition or continuing education expenses?	
12	How much stimulus money was received in the first round of stimulus (up to 1,200 per person)?	

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13	How much stimulus money received in the second round (up to \$600 per person (may have come in 2021)?	
14	Did you buy or sell stocks, mutual funds, bonds, or other investment properties?	
15	Did you donate money or things of value to a charitable organization (provide documents)?	
16	Did you receive a distribution from a retirement plan (401(k), IRA, etc.)?	
17	If you received a distribution from a retirement account, please explain if this was a COVID related distribution and why (job loss, furloughed, etc.)?	
18	Were you Quarantined or Isolated due to COVID? (Explain)	
19	Did you obtain health coverage through the Affordable Care Exchange (provided tax document)?	
20	For direct deposit or withdraw, please provide your bank name, routing number, account type and account number.	
21	If you owe taxes and would like to have it withdrawn from your account, what date would you want the withdraw scheduled?	
22	Please list any questions or other concerns you might have.	
23	Did you pay any estimated taxes?	
24	Did you pay for student loan interest for which you were liable?	

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25	Did you pay real estate taxes on personal home(s)?	
26	Did you pay mortgage interest on personal residence or vacation property?	
27	Did you sell real estate (explain and provide closing statement)?	
28	Did you make any direct contributions to a Health Savings Account outside of payroll?	
29	Did you serve on a jury?	
30	Did you have any income not reported elsewhere (ex: prizes, awards, gambling, odd jobs)?	
31	Do you have a foreign bank account, trust, or business (explain)?	
32	Did you own \$50,000 or more in foreign financial assets (explain)?	
33	Did you give a gift of more than \$15,000 during the year to one or more people?	
34	Did you have any debts cancelled or forgiven, including credit cards (explain and provide documents ex: 1099-C)?	
35	Did you go through bankruptcy proceedings?	
36	Did you engage in cryptocurrency transactions?	

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37	Did you make retirement contributions outside of your paycheck (IRA, Roth IRA, SEPP, etc.)	
38	If you are receiving Required Minimum Distributions (RMD) from a retirement plan, did you defer the RMD under COVID Provisions?	
39	Did you have interest income added to tax returns in 2020 and if so, how much?	
40	Did you receive Unemployment in 2020?	
41	Were you subject to unemployment fraud or any other ID theft during the year?	
42	Were you required to pay back unemployment benefits or other benefits that might be reported on a tax document?	
43	Aside from Stimulus, PPP, CFAP and PUA, please explain other COVID related grants you received?	
44	If you are a business owner and received PPP, what date was the PPP Forgiven?	
45	Did you received an Economic Injury Disaster Loan (EIDL), please explain?	
46	If you are Self-Employed, were there days you could not work due to COVID 1) Quarantine 2) Isolation 3) Caring for a Family Member w/ COVID 4) Caring for a child that was required to be home due to COVID related events? (Explain)	
47	If you are Self-Employed, are you interested in deferring some of the Self-Employment Tax as allowed under the CARES ACT or the Executive Order signed by the President in August?	
48	Self Employed COVID related benefits usually can not overlap, therefore we need periods of time covered by PPP and PUA funds before calculating Credits for Sick Leave and Family Leave, please advise dates of benefits if applicable.	

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49	If you have business records on a computer (QuickBooks), do you need my office to remote in to obtain copies/Backups?	
50	If you have business activities, did you make payments that would require Form 1099s to be issued?	
51	If you did make payments requiring Form 1099's, did you or are you going to issue them?	
52	If you wish my office to issue the 1099's, please provide Form W-9 and amount to be reported.	

**Documents that may be needed**

	Form W2 from your employers(s)	
	Interest Income (Form 1099-INT) from your bank(s)	
	Dividend Income (Form 1099-DIV) from your financial institution(s)	
	Gambling Winnings (Form W-2G) from your casino	
	Retirement Distributions (Form 1099-R) from your pension or retirement provider	
	Railroad Retirement Benefits (Form RRB-1099) from Railroad Retirement Board (RRB)	
	SSA-1099 from Social Security Administration	

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	1099-Misc from other Income sources	
	1099-NEC from other Income Sources	
	1099-Q from Qualified Education Programs	
	1099-B from Broker and Barter Exchange Transactions	
	K-1 from Partnerships, S-Corps. Trust or Estates	
	1098 Home Mortgage from your bank or lender	
	1099-G Unemployment Compensation from the state government	
	Proof of residency for any child you are claiming as a dependent from school, medical, postal or identification records (showing child name and address)	
	College expenses from college billing department/Student Account/Book Store/Retailer	
	Business Records or Ledgers from records you're required to maintain for business or rental activities	
	Paycheck Protection Program (PPP) Forgiveness Documents from from the bank that handled the PPP Loan	
	Other Documents you wish to provide from any source	
	Documents supporting Bright Start, College IL or other 529 Plan contribution from the plan administrator	
	K-12 educator with 900 hours of in classroom service, please upload receipts or summary of expenses including any PPE/COVID related expenses from taxpayer records	
	Photo ID of taxpayer and spouse (Driver's License, State ID, Passport, FOID Card) from State of Residency	
	Business asset trade agreements showing allowance for trade in from point of purchase or purchase receipt.	