

# CLIENT QUESTIONNAIRE for TAX YEAR 2020

Name \_\_\_\_\_ Phone \_\_\_\_\_ Date \_\_\_\_\_

Email \_\_\_\_\_

**\*\*\*\*\* We strongly recommend that you let us facilitate your balances due, and have your refunds directly deposited. We also believe it is in your best interest that you allow us to electronically file all of your estimated payments. The reason being if a mishap (on your part or ours) occurs it is much easier for us to determine the error and correct it faster and easier if we initiated the transaction. If you prefer us not do to do this and we need to investigate for any reason, because of the time involved we will have bill you for this which we have not billed for in the past. \*\*\*\*\***

Please check **YES** or **NO** to each of the following questions:

- Did you receive, sell, send, or exchange any monies/interest in any virtual currency? (Bitcoin/Crypto)  Yes  No
- Can you be claimed as a dependant by another taxpayer?  Yes  No
- Were there any Births, Deaths, Divorces, Marriages or Adoptions in 2020?  Yes  No
- Did you provide a home for or help support another person? Any disabled children under 21?  Yes  No
- Do you have any *Consumer Use Tax* to report for 2020? (Internet purchases)  Yes  No
- Did you make estimated tax payments?  Yes  No
- Did you receive any correspondence from the IRS or NE Dept. of Rev?  Yes  No
- Did you pay tuition or put money into a Nebraska college or ABLE savings plan?  Yes  No
- Did you give a gift of more than \$15,000 to one or more people?  Yes  No
- Did you have a Health Savings Account? / a Market Place Plan 1095A?  Yes  No
- Do you plan on applying for Social Security in 2021++?  Yes  No
- Did you withdraw from a mutual fund or sell a stock?  Yes  No
- Did you contribute, convert or withdraw a pension plan or IRA (Roth/Traditional)?  Yes  No
- Did you transfer a home from a parent to a child or other person?  Yes  No
- Did you receive any 1099-K's (income from paypal/google/internet) or 1099-Misc (prizes/awards)?  Yes  No
- Did you own any interest in a partnership; start or dispose of a business this year?  Yes  No
- Did you live, work own real estate in a foreign country; receive benefits or gifts from foreign sources?  Yes  No
- Did you make a cash/check charitable contribution of \$300.00 or more in 2020?  Yes  No

**CIRCLE any items that pertain to you or your spouse:**

Alimony, Scholarships, Grants, Savings Bonds, Jury Duty, Unemployment Compensation, Prizes, Bonuses, Awards, Gambling Winnings, Unreported Tips, Commissions, Worker's Compensation, Disability, Veteran's Pension, Installment Sale Payments, State Tax Refund, income from another state, rental property, sell or purchase a home, refinance any loan, bankruptcy, cancel debt, identity theft, barter, AirBNB, online sales or any other income?

**\*\*\*\* Only applicable if you are filing Head of Household: \*\*\*\***

- Were you single or legally separated for the last half of the year? (Need copy of separation agreement or divorce decree)  Yes  No
- Did a qualifying child or dependent live with you for at least half of the year?  Yes  No
- Did you provide more than 1/2 the costs of maintaining a home for you and dependent?  Yes  No

**\*\*\*\* Only Applicable if you have Rental Real Estate: \*\*\*\***

- Separate Bank Account?  Yes  No
- Do you maintain books and records?  Yes  No
- Any Independent Contractors?  Yes  No

Total hours devoted to rentals? \_\_\_\_\_

Whose name is on the deed to properties owned? \_\_\_\_\_