

Jupiter CPA, Inc. 2020 Questionnaire*

Please fill in the appropriate circle

YES NO **INCLUDE ALL THE NECESSARY DETAILS AND DOCUMENTATION***

Covid19:Did you receive an economic impact payment or experience economic loss? How much?

Personal Information:

- Did your marital, home address, any contact information or banking information change within the past year? **Circle change, provide info**
- Could you be claimed as a dependent on someone else's return for 2020? **Who's?**
- Did you receive correspondence from the State or IRS? **If so please provide a copy**
- If you have an overpayment of taxes would you like to apply them to estimated payments or refund by check Or direct deposit? **Circle your choice**
- Did you make any estimated payments during the year? **How much? dates paid:**

Dependent Information:

- Were there any changes in dependents and did they earn money and file their own return? **If yes, explain:**
- Did you provide over half the support for any other persons other than your dependent children during the year? **Who?**
- Did you pay for child care while you worked, looked for work or while a full-time student? **Provide receipts and EIN.**
- If you are divorced or separated with child(ren) (within the past year), do you have a divorce? **Provide Docs.**

Purchases, Sales and Debt Information:

- Did you start, or sell a new business or purchase a rental property during 2020? **Provide closing docs..**
- Did you acquire or lose any stock this year? **Provide documentation.**
- Did you purchase, sell, or refinance a principal residence or second home this year? **Provide closing docs.**
- Did you have any debts canceled or forgiven this year, such as home mortgage or student loans? **Provide doc.**
- Were you owed money which became uncollectable or incur a loss because of damage or stolen property?

Income Information:

- Did you receive unemployment or disability benefits/income this year? **Provide Disability/Income or 1099-G**
- Did you make or receive a gift for more than \$14,000 to or from anyone?
- Did you receive any awards, prizes, hobby income, gambling or lottery winnings? **Provide documentation.**
- Did you pay or receive alimony due to divorce prior to 2019? **How much?**

Retirement Information:

- Did you receive any Social Security benefits during the year? **Provide SS Statement.**
- Did you receive any lump sum payments from a pension, profit sharing or 401(K) plan? **Provide 1099R**
- Did you make withdrawals from or any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, or other qualified retirement plan? **Provide 1099R**

Education Information:

- Did you, your spouse or your dependents attend a post-secondary school during this year? **Provide a 1098T.**
- Did you make any withdrawals from an education savings or 529 Plan account?
- Did you pay any student loan interest this year? **Provide 1098E.**

Health Care Information:

- Did you enroll in Marketplace Coverage through healthcare.gov? **If yes, please provide any Form(s)1095A**
- Did you make any contributions to a Health savings account (HSA) or Archer MSA?
- Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicaid Advantage MSA this year?

Miscellaneous Information:

- Did you receive an Identity Protection PIN from the IRS or have you (or a dependent) been a victim of Identity Theft? **If yes, please provide the IRS letter you received.**
- Did you want a copy of your return emailed to you? **If so, please provide your email address:**
- Did you use fuel for any off-road business or commercial fishing? **Provide receipts.**

See second page if you think you can overcome the standard deduction.(\$24,800.00 Married, \$12,400.00 Single)

Signature: _____ Date: ____ / ____ / ____.

YES NO

- Did you pay long-term care premiums for yourself or your family?
- Did you make any cash or non-cash charitable contributions (clothes, furniture, etc.)? **Attach totaled receipts.**
- Did you use your car on the job for other than commuting? **Provide mileage.**
- Did you work out of town for part of the year? **Provide receipts.**
- Did you utilize an area of your home for your business?
- Did you make any major purchases during the year (including cars, electric vehicles, boats, etc.)? **Provide Bill of Sale.**
- Did you pay state or local real estate property taxes this year? **How much? \$** **When?**