



TAXES MADE SIMPLE, INC.

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Date dropped off: _____

Client Name: _____ **Tax Year: 2020**

- ** Do you want your return expedited? **Fee of \$45** is added to tax preparation. **Yes / No Initial:** _____
- ** For this year's tax return, would you like a **copy as a PDF or on CD (Cost of \$10)**? **Yes / No Initial:** _____
- ** Do you need to have the Tax Preparation Fee deducted from your Federal Refund? **Yes / No Initial:** _____
- **Processing fees from the Bank is \$50.90 added to the tax preparation fees deducted. **Yes / No Initial:** _____

- Yes/Unsure/No**
- *Would you like to have your **Refund direct deposited?** (confirm account information)(no fee).....
 - *If you have a **Balance Due**, can we withdrawal a balance due automatically from a bank account?
Date of Withdrawal? _____ **Initial:** _____ (no fee for withdrawal)
 - *How much did you receive from the **Economic Stimulus during 2020?** \$ _____
These funds are not taxable, but are reported to ensure you have received a stimulus payment.

Personal Information

- 1- Did your **Marital Status** change during the year? Single/Married/Divorced/Widowed/Separated
- 2- Did your **Residence** change during the year? If so, when move? _____
- 3- Can you be **claimed** as a dependent by another taxpayer? (ie. Can parents claim you?).....
- 4- Are you or your spouse **disabled and/or blind**?.....
- 5- Do you want to allocate \$3 of your tax to the Presidential Election Campaign Fund?.....
- 6 -Are you or your spouse in the military? Active Duty/Reserves/Guard/Retired

Dependent Information

- 7- Were there any **changes in dependents** from the prior year? (New child/ claiming parent).....
- 8- Do you have any children under age 18 with Interest, Dividends, Capital Gains?
- 9- If you alternate your dependent(s), who do you claim this tax year? _____
- 10- Did you maintain a home for someone not claimed as a dependent? (ie. Parent).....
- 11-Did you **contribute to an Ohio 529 College Plan?** If yes, Provide Year End Statement.....

Healthcare Information

- 12-Did you pay **Health Insurance Premiums** directly for yourself/family: \$ _____
- 13-Did you **receive a Healthcare Premium Assistance or "Marketplace" Assistance? Form 1095-A**
- 14-Do you have a **Health Savings Account (HSA)**? If yes, Provide Form 1099-SA.....

Income Information (Investments - Stocks - Foreign Accounts)

- 15-Do you have any **stock investments/brokerage account/investment accounts?**
If yes, provide year-end tax Forms 1099-INT, 1099-DIV, & 1099-B
- 16-Did you **dispose of any stock** during the year? Provide 1099-B.....
- 17-Do you have a stock option? Was there any exercised this year?
If yes, bring brokerage tax form 1099s and original cost and date.
- 18-Did you have any **Foreign Income** or **pay any Foreign Taxes?**.....
- 19-At any time during 2020, did you receive, sell, exchange, or otherwise acquire any financial interest in any **virtual currency (ie. BITCOIN)**? If so, provide printout of activity.....
- 20-Do you have any Foreign Bank Accounts, Retirement Accounts, Property?.....
- 21-Did you **cash in any U.S. Savings bonds?** If yes, provide Form 1099-INT from bank.....

Other Income (Retirement - Alimony - Unemployment - Business & Other)

- 22-Did you make any **Rollovers or Withdrawals from any Retirement Account?**.....
- 23-If you **reached Age 70 1/2**, did you withdraw your **Required Minimum Distribution (RMD)**?.....
- 24-Did you receive **Social Security Benefits** such as Retirement, Death, or Disability?.....
- 25-Did you **Receive or Pay Alimony** (not child support)? If yes, provide activity for year.....
- 26-Did you receive any **Unemployment or Disability Income?** If yes, provide 1099 Tax Form...
- 27-Did you **start or dispose of a business** during the year? **Receive any Form 1099-NEC/MISC?**...
- 28-Did you purchase a new interest in any Partnership or S Corporation?.....

