

3363-A Pelham Parkway
Pelham, AL 35124
(205)621-0388



3090-C Highway 14
Millbrook, AL 36054
(334)517-4925

2020 Tax Questionnaire

Client Name: _____

Yes/No

Did your marital status change during 2020?

Did you provide over half the support for any other person during 2020?

Do you have any dependents who are required to file a 2020 tax return?

Are any of your dependents not US citizens or residents?

Did you or your spouse receive unemployment during 2020?

Did you receive payments from a pension or profit-sharing plan in 2020?

Did you receive a distribution from an IRA or qualified plan that was rolled to another IRA or qualified plan in 2020?

Did you or your spouse receive any disability payments in 2020?

Did you receive tip income not reported by your employer in 2020?

Did you buy or sell any stocks or bonds in 2020?

Did you pay interest on a student loan for yourself, your spouse, or your dependents in 2020?

Did you, your spouse, or your dependents attend post-secondary school in 2020?

Did you pay alimony or collect alimony in 2020?

Did you purchase a motor vehicle or boat during 2020?

Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2020?

Did a lender cancel any of your debt in 2020?

Did you pay any individual for domestic services in 2020?

Did you make any energy improvements to your home during 2020?

Did you start a business, purchase a rental property, or farm, or acquire interests in a partnership, S corporation, or trust in 2020?

Did you at any time during 2020 have Health Insurance through the Marketplace?

Did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency in 2020?

Did you make any estimated tax payments in 2020?

Would you like direct deposit of any federal or state refund?

Yes/No

Do you have records to support your expenses & deductions?

- a) Tax law and IRS regulations allow deductions for travel if adequate records can be presented. Information must include: 1) Amount; 2) Time, place, and date; 4) Business purpose; 5) Description of gift(s); and 6) Business relationship of recipient.

Did you receive any income that was not reported on a W-2 or 1099? (contract work, gig work, or side jobs)?

New for 2020:

Did you receive an Economic Stimulus Payment? If yes, you should have received IRS Notice 1444.

- a. Yes, I received and have attached a copy of my IRS Notice 1444.
 - b. No, I do not have a copy of my IRS Notice 1444, but I received a stimulus in the amount of \$ _____.
1. If you did not receive the IRS Notice 1444, the IRS provides a website to check the amount of the Economic Stimulus Payment, may our firm access to verify the stimulus payment you received? Yes No

Did you take a Coronavirus Related Distribution from IRA or Qualified Retirement Plan?

Did you receive a PPP Loan? If yes, provide PPP Loan Approval & PPP Loan Forgiveness Approval Documentation?

Did you receive an SBA EIDL Grant? If yes, provide SBA Grant documentation?

Did you receive any other small business Grants, such as AL Revive? If yes, provide confirmation documentation?

I affirm that the above information is correct to the best of my knowledge.

Taxpayer _____ Signature _____ Date _____

Spouse _____ Signature _____ Date _____