

Sauppé Tax Service LLC

New Client Tax Questionnaire 2020

Name (F, L) : _____ Spouse : _____

Taxpayer Soc. Sec# _____ Spouse Soc. Sec. # _____

Taxpayer Date of Birth _____ Spouse DOB: _____

Address: _____

City, State, & Zip: _____

Primary Phone # _____ Secondary Phone# _____

E-mail: _____

Routing # _____ Bank Account # _____

Eligible Dependents for 2020

Please list all eligible dependents for 2020. **Your child born prior to 1/1/2001 must be a full-time student for at least five months during the year and under the age of 24 all year. Any child who does not meet this age/student test or any other dependent must be a relative, usually must be a member of your household, must have income below \$4,300 for the year, and you usually must have contributed more than 50% of their support...

<i>Dependent Name</i>	<i>Date of Birth</i>	<i>Social Security #</i>	<i>Dependent Relationship to Taxpayer</i>	<i>Months in 2020 Lived with you</i>	<i>Months in 2020 a Full Time Student</i>	<i>Taxpayer paid more than 50% of support</i>
						YES NO
						YES NO
						YES NO
						YES NO

Estimated tax payments (EFTs or checks written by you) FOR 2020, including payments in the first quarter of 2021. This does **NOT** mean withholding from W-2's or 1099's

Federal		State		City		School Dist/REAL ESTATE	
DATE	AMOUNT	DATE	AMOUNT	DATE	AMOUNT	DATE	AMOUNT

Because of IRS regulations, your federal and state returns will be electronically filed unless you complete and return a required IRS waiver of electronic filing prior to our completion of your return. Any refund on these returns will be deposited into the bank account shown above and any balance due will be deducted from this account on April 15th. By signing below you are confirming that you have included all income received during the year and that you have read the terms of engagement provided to you and agree with all items.

Signature of taxpayer _____ Signature of spouse _____

Taxpayer occupation _____ Spouse occupation _____

Please turn over - continued on back.

All of these questions pertain to the 2020 year. Any <u>YES</u> answers will require complete details and documentation.		
1	Do you have funds in a foreign bank account or give/ receive a distribution from a foreign trust?	YES NO
2	Did you contribute cash or items to a charity in 2020 that you wish to claim on your tax return. If YES, you MUST complete the Charitable Deduction Recap sent to you.	YES NO
3	Did you purchase any goods online or through catalogs that did NOT include sales tax? If yes, please indicate total amount purchased \$_____.	YES NO
4	Do you have written documentation for all business miles? If yes, you MUST complete the mileage section on the bottom of this form. If no, you cannot claim mileage.	YES NO or N/A
5	Did you pay or receive alimony? If yes, provide complete details including date of divorce and a copy of the divorce decree.	YES NO
6	Did you pay child care expenses? If yes, please include documentation from the provider that shows amount paid, dependent covered, time period covered, and ID number of provider.	YES NO
7	Did you buy or sell a home this year or refinance an existing home? If yes, please provide the settlement statement from the purchase, sale, or refinance..If a refinance, you MUST provide documentation on how the loan proceeds were used.	YES NO
8	Do you have a Health Savings Account? If yes, indicate any amounts you contributed OUTSIDE of work, and provide details, including the 1099SA form, for any withdrawals made during the year. Include proof that these distributions were spent on qualified medical care by providing the medical bills or a detailed recap showing medical provider, date, and amount.	YES NO
9	Did you, or any of your dependents, contribute to or make a withdrawal from any state 529 plan? If yes, please provide copies of all pertinent documents including the 1099Q.	YES NO
10	Did you pay any student loan interest? If yes, submit copies of all 1098Es received.	YES NO
11	Did you pay any post-secondary (beyond high school) expenses for you, your spouse, or your dependents? This does NOT include student loan interest. If yes, you must provide Form 1098T and DETAILED documentation on all amounts paid during the year.	YES NO
12	If you answered YES to question 11, do any of the students involved have a felony drug conviction? If yes, provide details.	YES NO or N/A
13	If you own rental property or had your own business (even on a small scale), did you make any payments that would require you to file any 1099 forms?	YES NO or N/A
14	If you answered yes to question 13, did you or will you file all required 1099 forms?	YES NO or N/A
15	Do you have any children under the age of 24 with unearned (not from a job) income over \$350? If yes, please provide details.	YES NO
16	Did you make a gift or gifts to any individual during the year worth \$15,000 or more? If yes, provide name of recipient, address, description of item(s) given, and amount.	YES NO
17	If you are a full-time teacher, did you pay for any supplies for your classroom? If yes, please provide details on items purchased and amounts.	YES NO or NA
18	Did you get insurance through the Marketplace (healthcare.gov)? If yes, provide Form 1095A..	YES NO
19	Did you receive, sell, exchange, or otherwise acquire any financial interest in virtual currency?	YES NO
20	Do any of these situations apply to you? Legally blind. Paid for domestic service in your home. Purchased any items that qualify for the solar energy credits. Contributed to a retirement account outside of work. Purchased a car, boat, or truck in 2020. If yes, please provide all pertinent details including a copy of the vehicle invoice showing sales tax paid..	YES NO
21	Please indicate amount of Economic Stimulus Payment you received for 2020. This would include amounts received in early 2021. If none enter zero \$ _____	
22	What is your marital status as of 12/31/20?	Single Married

2020 Mileage Recap

1 st Business	2 nd Business	Charitable	Medical	Moving	Personal	Total All Miles**

**The total must equal the sum of the other categories and should be the total miles driven during the year.

Car Information: Make_____ Model_____ Year_____

Your signature(s) on page one verifies that this log is a true and accurate reflection of mileage for 2020 and that you have the records to substantiate this mileage.