



**YES NO**

YES	NO	
		26 Did you cash any series EE or I U.S. Bonds that were issued after 1989 to pay for college?
		27 Did you receive any state or local income tax refunds from prior years (other than your 2019 refund)
		28 Did you receive any social security benefits during the year? Please provide Form SSA-1099
		29 Did you receive any payments from a pension, profit sharing or 401(k) plan during 2020? Please provide Form 1099-R's
	*	30 Did you take any distributions from your retirement plan due to COVID-19? If yes, was the intention to pay tax in full in 2020 or pay the tax on the distribution in 3 years? Or pay it all back to your retirement account in 3 years?
		31 Did you make any withdrawals from, or contributions to, an IRA, ROTH, Keogh, Simple, SEP, 401K, myRA or any other qualified retirement plan during the year?
		32 Do you or your spouse have any IRA accounts? If so, what kind? (i.e. traditional or ROTH)
		33 Have you ever made a nondeductible contribution to a traditional IRA?
		34 Did you or your spouse contribute funds to either a traditional or ROTH IRA?
		35 Did you withdraw money from any retirement accounts or "rollover" a retirement plan into another plan? (Including your RMD)
		36 Did you convert any retirement funds to ROTH funds?
		37 Did you recharacterize any IRAs this year?
		38 Did you receive a Schedule K-1 from a Partnership, S-Corp, Trust or Estate? If so, please attach
		39 Did you or your spouse receive any social security benefits during the year? Attach Form(s) SSA-1099
		40 Did you receive any disability income during 2020? Please include Form 1099-R.
		41 Did you receive any type of prize or award during 2020, including lottery winnings?
		42 Did you receive any Stimulus/Economic Impact Payments (COVID Tax Relief). If so, how much for each? If possible provide the IRS letter 1444
		43 Did you incur any gambling winnings/losses during 2020? Please provide win-loss statements and summary of winnings (from the casino). Do you track your daily wins and losses? If so, please provide daily net wins/losses. Also provide any Form W-2G's that you received as well as a summary sheet of W-2G's received (can be obtained on casino website)
		44 <b>Did you or your spouse receive any unemployment benefits during 2020 (please provide 1099-G)?</b>
		45 Did you or your spouse receive any Combat Pay or Jury Duty Pay?
		46 Did you or your spouse receive any alimony, or separate maintenance payments? - (Note please be aware that there are changes for divorces occurring prior to 01/01/2019). If yes, how much and divorce date?
		47 Were you given any stock options and/or did you exercise any stock options in 2020? If yes, additional info may be needed.
		48 If you receive(d) restricted stock at work, did any become vested in 2020?
		49 Did you have any credit card debt forgiven in 2020? Did you receive a 1099C?
		50 Does anyone owe you money which has been deemed uncollectible by the appropriate authorities?
		51 Did you receive any income not mentioned in the above questions? If so, what kind? _____

**BUSINESS/ RENTAL INFORMATION**

		52 Do you own a business? A) Please explain business activities _____ B) Please provide all business income and expenses.
		53 Did you use your vehicle for your business? (Please provide mileage log)
		54 Did you make any payments in 2020 that would require you to send out Form 1099? If yes, did you or will you send out all required forms?
		55 Did you pay health insurance premiums for your employees during the year? And if so, did you obtain the insurance from the marketplace (small business health options program (SHOP)?
		56 Did you receive any PPP-Loan, EIDL, or any type of Grants from State or federal? If so, how much?
		57 Did you report as income all of the cash you collected in 2020?
		58 Did you purchase any business assets (furniture, equipment, etc.) or convert any assets to business use during the year? If yes, please list on an attached sheet the date placed in service, cost or basis of asset, and business use percentage.



YES NO

**ITEMIZED DEDUCTIONS (BRING RECEIPTS/DOCUMENTATION FOR ALL EXPENSES)**


- 84 Did you pay mortgage interest (including home equity) and/or mortgage insurance premiums in 2020? (Form 1098)
- 85 Did you pay any real estate taxes in 2020? Please provide statements from town (can get online) showing amounts actually paid in 2020 (regardless of year of Grand List)
- 86 Did you pay any motor vehicle taxes in 2020? Please provide statements from town (can get online) showing amounts actually paid in 2020 (regardless of year of Grand List)
- 87 Did you make cash or noncash charitable contributions in 2020? (please let us know, even if you do not itemize!!) For non-cash contributions, please provide a detailed listing of the items donated, noting the condition (and thrift value) of each. Attach this listing to the receipt you received from the charitable organization (e.g. Goodwill).
- 88 Did you drive your car for charitable purposes? If so, please provide mileage
- 89 Did you pay any health, dental or LTC insurance premiums or pay medical expenses (including prescriptions and improvements to home for medical reasons)? Please obtain 2020 prescription summary from your pharmacy (in lieu of individual pharmacy receipts). Also provide mileage and lodging (not meals) for seeking medical care.
- 90 Do you have one or more H.S.A. (Health Savings) Accounts? If so, please provide forms 1099SA and 5498SA for ALL accounts.
- 91 In addition to your payroll deduction for HSA contributions, did you contribute directly to your HSA account for tax year 2020?
- 92 Did you make any large purchases (car, boat, etc.) for state sales tax deductions?
- 93 Did you make any estimated Federal and State tax payments during the year?
- 94 Have you provided ALL your deductions?

**QUESTIONS FOR CONNECTICUT RETURN**


- 95 Did you contribute to a Connecticut 529 plan?  
If yes, please provide statement (showing account number and total contributions for the year.)
- 96 Are you receiving a CT teacher's pension? (CT exempts 25% percent in 2020)
- 97 Are you receiving a U.S. Military pension (CT exempts 100%).
- 98 Did you have any out of state purchases for which you may owe CT sales (use) tax?

**DUE DILIGENCE FOR HEAD OF HOUSEHOLD, EIC, AOTC & CHILD TAX CREDIT**

This IRS is requiring tax professionals to perform due diligence for those taxpayers claiming Head of Household filing status, Earned Income Credit, Child Tax Credit and American Opportunity Tax Credit. Please provide documentation to prove age, relationship, residency and support of your dependent (e.g. birth certificates, social security cards, school/medical records, 1095(A,B,C) Health Insurance forms showing named insureds & address of record, Daycare records, Rent receipts, Utility bills, Property tax bills, Divorce decree, Form 8332 (Form signed by the custodial parent allowing non custodial parent to claim dependent). For American Opportunity Credit, we will need the 1098T along with the payment billing summary from the college.

**COPY OF DRIVERS LICENSE REQUIRED**

**IMPORTANT:** We will require copies of both taxpayer and spouse drivers license in order to efile your return.

Signature of person completing form

Date



YES NO

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