

HD Tax Preparation & Small Business Services

Tax Year 2020/Filing Year 2021

Name:

SSN:

Address:

Contact #:

Personal Information:

Y/N

1. Did any births, adoptions, marriages, divorces, or deaths occur in your family in the last year?	<input type="checkbox"/>
2. Did you purchase or sell your principal residence or did your address change?	<input type="checkbox"/>
3. Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return?	<input type="checkbox"/>
4. Were you in a registered domestic partnership, civil union, or same-sex marriage during 2020?	<input type="checkbox"/>
5. Were either you or your spouse in the military or National Guard?	<input type="checkbox"/>
6. Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax correspondence?	<input type="checkbox"/>

Dependents:

1. Are there any changes in your dependents from last year? Births, adoptions, etc.	<input type="checkbox"/>
2. Did you have any children under 19 (or 24 if a full time student) who received more than \$1,050 in investment income?	<input type="checkbox"/>
3. Did you pay education expenses for your dependent children?	<input type="checkbox"/>
4. Did you pay any dependent care expenses for a child or a parent?	<input type="checkbox"/>
5. Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent?	<input type="checkbox"/>
6. Are all of your dependents either US residents or citizens?	<input type="checkbox"/>

Health Care Coverage:

1. Did you or a member of your family have health coverage in 2020? (The entity that provided the coverage may have sent you a Form 1095-A, 1095-B, or 1095-C, that lists individuals in your family who were enrolled in minimum essential coverage and shows their months of coverage.)	<input type="checkbox"/>
2. Did you have Health Insurance Marketplace granted coverage exemption or are you claiming a coverage exemption?	<input type="checkbox"/>

Income (in 2020, did you or your spouse have any of the following?):

1. Wages? (include form(s) W-2)	<input type="checkbox"/>
2. Non-employee compensation? (include form(s) 1099-MISC or 1099-NEC)	<input type="checkbox"/>
3. Interest income? (include form(s) 1099-INT)	<input type="checkbox"/>
4. Dividend income? (include form(s) 1099-DIV) Investment Income? (1099-B or consolidated stmt)	<input type="checkbox"/>

7. Did you make any contributions to HSA (Heath Savings Account) in 2020? (Form 5498)

Purchases, Sales, Gains, and Losses:

1. Did you exchange any securities or investments for something other than cash?

2. Do you have any short sales, commodity sales, or straddles?

3. Did you receive Form 2439?

4. Did you buy or sell any bonds?

5. Did you receive stock from a stock bonus plan with your employer?

6. Did you sell any other personal assets at a gain?

7. Did you sell any real estate during the year?

If yes please specify:

Personal

Business

Real Estate Professional

Other

8. Did you sell any assets using the installment method?

9. Did you receive proceeds from a prior year installment property?

10. Did you purchase a rental property?

11. Did you exchange any property for another property?

12. Did you incur loss because of damaged or stolen property?

13. Did you purchase a new vehicle, aircraft, or boat?

14. Did any security become worthless during 2020?

15. Did any debts become uncollectible during 2020?

16. Did you purchase any items acquired out of state, online or by mail order that did not include sales tax?

Business and Rental Property Income & Deductions:

1. Do you own rental property and qualify as a Real Estate Professional?

2. Did you start or acquire a new business?

3. Did you sell any part of an existing business, or sell business assets?

4. Did you cease operating any business or rental property?

5. Did you remove any of your business assets for personal use?

7. Did you claim a First-time Homebuyer credit for a home purchased in 2008?

8. Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit?

9. For the MT 2EC, are you age 65 or older & a full time Montana resident?

Return Preparation & Filing

1. Do you want to e-file your return?

2. If you are due a refund, how do you want to receive it?

- Check sent to you in the mail
- Apply to next year's estimates
- Direct deposit *

Type of Account

- Checking
- Savings

If you owe taxes, how do you want to pay them?

- Paper check sent with my return
- Direct debit *

Type of Account

- Checking
- Savings

Credit Card

Installment Agreement

* Please have bank account info ready for appointment

3. Do you want to allow your tax preparer to discuss this years return with the IRS?

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If no, enter another person (if desired) to be allowed to discuss this return with the IRS:

Designee's Name: _____

Phone Number: _____

Personal Identification Number (5-digit PIN): _____

Other Notes & things we should know:



