



Background Information

This information will be used to determine your filing status. If you have recently married, be sure that your spouse has a social security number and, that if her name has been changed it is reflected on her social security card.

Taxpayer name: _____ Date of Birth: _____ Month/Date/Year

U.S. Social Security #: _____ Canadian Tax Identification #: _____
(only needed if filing a Canadian return)

Marital status: Single Married Divorced Is this a change from last year? Yes No

Spouse's name: _____ Date of Birth: _____ Month/Date/Year

U.S. Social Security #: _____ Canadian Tax Identification #: _____
(only needed if filing a Canadian return)

Driver's Licenses

Many states ask for your driver's license information to help verify your identity. If your license is not issued by a US state or you do not have a license, you may skip this section.

Driver's License Number _____

Issuing State _____ Date issued: _____ Expiration: _____

NEW: Spouse's Driver's License Number _____

Issuing State: _____ Date issued: _____ Expiration: _____

Mailing Address for Refunds & Correspondence:

House number & street _____

City State Postal Code

Cell phone: _____ E-mail: _____

Twitter: _____ How would you prefer us to contact you? _____

(in-season) school district: _____ (off-season) school district: _____

County where you work: _____ County where you live: _____

Direct Deposit

Do you want your refunds directly deposited into your bank account yes no

Do you want any balances owed directly withdrawn from your bank account yes no

IMPORTANT: If you answered yes to either of the above questions - **please include a voided check stapled to your questionnaire.** Note if you have a balance due and check yes to the above question I will notify you of the amount due prior to filing your taxes.

Dependents

All children must have a social security number or a tax identification number, if they don't please contact us for information about obtaining one.

Dependent's name	Date of Birth	Social Security Number	Relationship
_____	___ ___ ____	_____	_____
_____	___ ___ ____	_____	_____
_____	___ ___ ____	_____	_____
_____	___ ___ ____	_____	_____

Can you claim all the dependents listed above? Yes No (please specify who): _____

If you listed any dependent who is 19 years old or older, please check what applies below:

- Your child in college
- Lived with you for at least half the year
- You paid for at least half of their living expense

Child Care Expenses

A credit is allowed for all qualified child care expenses paid.

You are only eligible if both parents work and your child is under the age of 13

Name of child(ren): _____

Care provider name: _____

SS # or Business ID #: _____

Care provider address: _____

City/State and postal code: _____

Dates care was provided: ___ ___ ____ to ___ ___ ____ total amount paid: _____

Important: Please provide separate information for each child's expenses that were paid and separate information for each child care provider used.

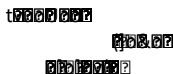
Higher Education Tuition and Interest

Tax credits are available for tuition and student loan interest incurred by students pursuing college or graduate degrees. The taxpayer, spouse or any of their dependents can incur these expenses. These deductions and credits are limited to your income level – however if you have paid tuition or student loan interest please include the amounts here and let me determine whether you qualify.

Name of student: _____ University or College: _____

Tuition paid (include 1098-T form): _____

Student loan interest paid (include 1098-E form): _____



United States & Canada Wages and Income

Please provide all wage slips (W2 in US and T4 in Canada)

Employer		W2 or T4 slip enclosed
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no

If you missed any US road games – list the dates and reason you didn't travel with team:

Miscellaneous Income

If you received payments for coaching, educational clinics or camps, which were not included in your wage slip you still need to report this income. Failure to do so will result in penalty and interest to be added on to this amount later by the IRS. **This income will be reported on a 1099-Misc slip or 1099-NEC.**

Employer/Payer	1099-MISC enclosed	Amount
_____ Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____ Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____ Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____ Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no	_____

Investments

If you have a stock broker, please inform them we may be calling for information on your account!

Name of Broker: _____ Telephone #: _____

Brokerage firms will send out 1099-B's (along with your 1009-Int/Div) and 'Realized Capital Gains Reports' by early February. Should you have this information please provide these forms. If you were not provided this information, and you sold stocks during the past year, please be sure to fill out the information below:

Name of the stock*: _____

Number of shares sold: _____ Date purchased: ____ ____ ____ Date sold: ____ ____ ____

*** If you had more than one stock sold please report all the information on an additional piece of paper and attach it to the questionnaire.**

Interest and Dividends

If you received interest or dividends from a bank account or brokerage firm, please indicate below all financial institutions in which you have investment income. All information will be reported on forms 1099-Int or 1099-Div in the US and T4 or T5 slips in Canada.

Bank or Firm	Slip enclosed	Amount
_____	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____	<input type="checkbox"/> yes <input type="checkbox"/> no	_____

Please note: If you have **not** received a form from your bank or brokerage firm, please indicate the amount of interest or dividends earned over the past year. By law every bank or financial institution that pays over \$10 in interest or dividends must supply you with a tax slip showing the amount of income you received by February 15th.

Foreign Bank Accounts

If you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account, please indicate so below. Although there may not be any tax implications we still need to report *each* account that exceeds \$10,000 during the year.

Bank Name and Address	Account number	Maximum Amount
_____	_____	_____ (Currency)
_____	_____	_____ (Currency)
_____	_____	_____ (Currency)
_____	_____	_____ (Currency)

Deductions and Credits

Deductions lower your taxable income while credits lower your actual tax. All deductions and credits should be substantiated with receipts.

Property

If you own property and pay taxes, or have a mortgage, please fill out the following section. *If you **don't** own a house or pay property taxes on land or a house, please skip this section.*

Did you buy or sell your house over the past year? yes no

If you bought or sold your house over the past year please enclose a copy of your closing statement (HUD-1). If you sold your property, I'll also need a copy of the original closing statement from the purchase.

Taxes and Interest

You can deduct the taxes paid on your primary or vacation home as well as any interest paid on your home mortgage loan. **Should you have rental property please put that information on page 11.** *If you paid property taxes through an escrow account, this amount will be found on your year-end 1098 mortgage and interest statement.* If you did not pay your property taxes through an escrow account, you should have received a receipt from your town clerk for taxes paid during the past year.

Property address	Taxes	Interest paid	1098 Slip
_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

If you refinanced your home, you may be able to deduct the home equity loan interest paid over the following year as a deduction

Home equity loan interest: _____ (please enclose 1098MIS form)

Personal Property Tax

Personal property tax on your automobile is deductible if it is based only on the value of the automobile and is charged on a yearly basis.

Auto Registration Taxes: _____ State registered: _____ Please enclose your receipt

Auto Registration Taxes: _____ State registered: _____ Please enclose your receipt

Estimated tax payments

If you made any estimated tax payments throughout the year, please indicate the amounts below. These payments are separate from what you were required to pay when your tax return was filed and separate from any car registration/taxes paid.

Federal:

Paid by 4/16/20

Paid by 6/15/20

Paid by 9/17/20

Paid by 1/15/21

State: _____

Paid by 4/16/20

Paid by 6/15/20

Paid by 9/17/20

Paid by 1/15/21

Charitable Contributions

Contributions of money or property to a qualified organization are deductible. For contributions of over \$250 you need a receipt.

Organization	Donation	Amount	Receipt	
_____	_____	_____	<input type="checkbox"/> yes	<input type="checkbox"/> no
_____	_____	_____	<input type="checkbox"/> yes	<input type="checkbox"/> no
_____	_____	_____	<input type="checkbox"/> yes	<input type="checkbox"/> no

Charitable miles: _____

Medical Expenses

Medical expenses are amounts that are not paid by insurance or employer and they must exceed 7.5% of your income. **Unless you have a large amount of expenses or do not have health care through your employer you will probably not qualify for this deduction.**

Expense	Amount	Expense	Amount
Prescriptions	_____	Medicine	_____
Medication Insurance paid	_____	Eyeglasses, contacts or dentures	_____
Doctor or Dentist visits	_____	Lodging	_____
Hospital expenses	_____	Number of medical miles: _____	

Health Insurance

If you are a resident or a citizen of the US you will need to report your health insurance coverage. **Important:** If you bought insurance in the marketplace, you should have been issued a 1095-A. **Please be sure to include that document.**

Employee-provided health insurance coverage yes no

Name of employer: _____ Monthly payment: _____ (only if out of pocket)

Marketplace assigned policy issuer & number: _____ State: _____

Start date: _____ Termination date: _____ Monthly payment: _____

Other policy issuer & number: _____

Start date: _____ Termination date: _____

1095 (A,B or C) included: yes no

Over the past year were you insured: all 12 months - if not list months w/o coverage: _____

Small Business Revenue and Expense

If you have a financial interest in a business or partnership, please attach all K-1 forms that you received

Partnership	Description	K-1 slip enclosed
_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

Sole Proprietorship

If you or your spouse own a small business, your income from this business will need to be reported. You report net profits or loss for the year on a schedule C and it becomes part of your adjusted gross income. A net loss from the business can lower your adjusted gross income.

Name of Business: _____ Business ID #: _____

Income from sales: _____

Expenses	Amount	Receipts
Cost of goods sold:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Office expense:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Advertising:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Contracted labor (see below):	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Insurance:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Equipment:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

Please note if you paid an individual over \$600 for contracted labor – please notify us ASAP as you are obligated under law to issue them a 1099-Misc prior to January 31st.

Automobile Expense

Total miles driven during the year: _____ Business miles: _____

Home Office Expense

If you or your spouse have a home office, you can take a percentage of all your expenses paid for your home or apartment.

Total square footage of house/apartment: _____ Area used exclusively for business: _____

House utilities: _____ Repairs/maintenance: _____

Rental Real Estate

This form is only for taxpayers that own rental real estate. If you own real estate with partners and are supplied tax inform, please attach it to this form. If you own more than one property, please prepare one sheet for each property. *If you **do not** own rental real estate, please skip this page.*

Kind of property: HOUSE CONDO/APARTMENT OTHER

Property address: _____

Purchase date: ____ ____ _____ Date sold (if sold): ____ ____ _____

Original cost: _____ Capital Improvements: _____

Are you the sole owner: yes no if no, who else owns the property? _____

If you lived in the property at all during the year please list those dates: _____

Total rents collected this year: _____

Expense	Amount	Receipts
Advertising	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Auto & Travel	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Cleaning & Maintenance	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Commissions	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Insurance	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Legal fees	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Management fees	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Mortgage interest paid to banks	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Other interest	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Repairs	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Supplies	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Taxes	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Utilities	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Wages & Salaries	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Other	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

Retirement Contributions

Traditional IRA

Does your employer offer a retirement plan (box 13 on W2) yes no

If your employer offered a retirement plan you will not receive any benefit from contributing to a traditional IRA – however there are exceptions based on your income level. **If you are interested in learning if you qualify please feel free to ask.**

Traditional IRA's provide two benefits:

- They reduce your current tax liability
- They provide funds for your retirement

Amount to contribute: _____ (you must make this prior to April 15th)

The tax savings for a Traditional IRA are immediate. Any contribution you make will lower your taxable income by your tax rate. Therefore, if your tax rate is 25% you will save \$250 for every \$1,000 you contribute

Roth IRA

If your employer offers a retirement plan and your total household income is less than \$206,000 (married) or \$139,000 (single) you may contribute to a Roth IRA. However, there is a legal backdoor way to contribute to a ROTH IRA even if your income is higher than the limits – **please notify us if you're interested in finding out how.**

Amount to contribute: _____ (you must do this prior to April 15th)

There are no immediate tax savings on a Roth IRA – however when you withdraw your money later in life you will not have to pay tax on that money plus any interest that has been earned on that money. Therefore, if you contribute \$1,000 and that money grows to \$5,000 over the next 30 years you will not have to pay tax on the \$5,000 when you withdraw it.

RRSP

This only applies if you filed a Canadian tax return.

RRSP's are tax deferred savings plans for your retirement (like a traditional IRA). RRSP contributions are different for each individual and are determined by your income. If you are interested in making a RRSP contribution you need to make it prior to the February 28th deadline.

Yes I'm interested please call me

Amount to contribute: _____