

Client Information Sheet

Please complete all lines

Name

Street

Town

State

Zip

Phone H - _____
C - _____ taxpayer
C - _____ spouse

Email (T) _____
(S) _____

Please answer all Questions

(personal email preferred)

Yes No

- 1) Was health insurance purchased on the exchange – Access Health – if so, need form 1095
- 2) Any foreign bank accounts - if yes, and balance is over \$10,000 need statements
- 3) Any purchases made online where sales tax was not paid but would have been paid if bought in CT
- 4) Any CHET (CT Higher Education Trust) contributions or distributions
- 5) Any energy credit improvements – water heater, furnace, windows, insulation, exterior doors solar panels, HVAC – (lifetime maximum credit of \$500)
- 6) At any time did you receive, sell, send, or exchange any virtual currency – (bitcoin etc)
- 7) Has there been a change in marital status
- 8) Do you have an HSA – Health Savings Account – need forms 1099-SA and 5498-SA
- 9) Did you receive any unemployment during 2020 – we need UC-1099G that was mailed to you
- 10) Did you receive any stimulus payments – need amount(s) and/or letter(s) \$ _____ (1)
Letter 1444 – 1st pmt Letter 1444-B – 2nd pmt \$ _____ (2)
- 11) Did you make any cash/check charitable contributions – Anyone can claim up to \$300 without itemizing \$ _____ - it is a new deduction on the front page.
- 12) Did you, your spouse or dependents have qualified education costs or student loan interest
- 13) Did you take a retirement distribution due to Covid and if yes:
Are you electing to spread the tax over 3 years Yes No
- 14) Did you make any estimated payments for 2020
- 15) N/A - Are there any changes in claiming dependents for 2020
- 16) N/A - Did you forgo your required minimum distribution this year
- 17) N/A - Please provide your bank account information if you want direct deposit
Bank _____ Routing # _____ A/C # _____
- 18) Business owners – Did you receive a Paycheck Protection Program (PPP) Loan \$ _____

Please add comments and questions on reverse side

