

# Client Intake Data Sheet—Tax Year 2020

*As paid tax preparers, the IRS and NYS requires that we e-file all returns.*

Name: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Preferred E-Mail: \_\_\_\_\_

Preferred Method and time for contact: \_\_\_\_\_

**Please include a readable copy of the front and back of your Driver License or Non-Driver ID EVEN IF YOU HAVE PROVIDED TO US IN THE PAST.**

## To assist in preparing your tax return, please answer the following questions:

- 1.) Stimulus Payments (Economic Impact Payment). Indicate the exact amount you received. If you did not receive the payment, indicate \$ 0.

Stimulus Payment 1: \$ \_\_\_\_\_

Stimulus Payment 2: \$ \_\_\_\_\_

- 2.) For Taxpayers taking Required Minimum Distributions:

Did you make a Qualified Charitable Distribution (QCD) directly from your IRA? .....  Yes  No

If so, how much of your RMD went to charity \$ \_\_\_\_\_

**\*NOTE: 2020 RMDs were waived, however, you may have elected to still take your distribution and/or make charitable distributions from your IRA.**

Did you repay all or any portion of your RMD due to waiver of RMD requirements. .  Yes  No

If so, how much was re-paid? \$ \_\_\_\_\_

- 3.) For NYS residents:

Did you receive a STAR Credit in the form of a check in 2020? .....  Yes  No

If yes, amount \$ \_\_\_\_\_

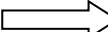
- 4.) Did your marital status change during 2020? .....  Yes  No

If yes (explain) \_\_\_\_\_

- 5.) Did you or your spouse receive any foreign income, have a foreign bank account(s) or foreign trust?

Yes (explain) \_\_\_\_\_  No

**NOTE: If you are required to file an FBAR, the filing deadline is April 15, 2021.**

OVER 

6.) ...I would like my **refund directly deposited**.....  Yes  No

7.) I would like my **tax payment directly withdrawn** from my bank account. ....  Yes  No

For 6 and 7 above, please attach a **VOIDED CHECK** (if checking acct) Indicate bank info:

Bank Name \_\_\_\_\_  Checking  Savings (select one)

Routing # \_\_\_\_\_ Account # \_\_\_\_\_

8.) Did you move or change your address in 2020/2021?.....  Yes  No

If yes, here is my new address: (Date of move outside or into New York State: \_\_\_\_\_)

\_\_\_\_\_  
\_\_\_\_\_

9.) I (and/or my spouse) am/are/is a:

Teacher  Volunteer Firefighter/Ambulance  Military

10.) Are you adding any new dependents for tax year 2020?.....  Yes  No

(Do not include your spouse)

If Yes, list name, date of birth and social security number.

Name

Date of Birth

Social Security Number

\_\_\_\_\_  
\_\_\_\_\_

11.) Was your dependent (child/children) a full-time college student in 2020? .....  Yes  No

If yes, list name, year in college (1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup>, or 5<sup>th</sup>) and semester(s) attended.

Name

Year in School

Semester(s) Attended

\_\_\_\_\_  
\_\_\_\_\_

*Be sure to provide 1098-T, 1098-E, and 1099-Q forms with your documents, even if they are in your dependent child's name. Also, please include a transcript from the school of the amounts paid for tuition. The 1098-T is not always an accurate reflection of the amounts paid. 1098-Ts are often available on the student's online account with the school.*

12.) Are you removing any dependents for tax year 2020? .....  Yes  No

If yes, list name and reason.

Name

Reason

\_\_\_\_\_  
\_\_\_\_\_

13.) Did you pay any estimated Federal or State taxes (not withholding) for 2020? .....  Yes  No

If yes, please provide amounts and dates:

Federal Estimated Payments

State Estimated Payments

Amount

Date Paid

Amount

Date paid

\$ \_\_\_\_\_ / / \_\_\_\_\_

\$ \_\_\_\_\_ / / \_\_\_\_\_

\$ \_\_\_\_\_ / / \_\_\_\_\_

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Additional info or comments: please attach additional sheets if necessary.