

# 2020 Tax Fact Sheet



Did your address (physical or mailing) change in 2020? \_\_\_\_\_

If so, what is your new address (physical or mailing)?

\_\_\_\_\_

Were you married or divorced in 2020? \_\_\_\_\_

Do you need to add or remove child(ren) to your return? \_\_\_\_\_

Did anyone live with you in 2020, who isn't on your tax return? \_\_\_\_\_

If from VERMONT did you include your property tax bill to be used to file your Homestead? \_\_\_\_\_

Did you or your spouse renew your drivers license in 2020, if so need new issue date and expiration date

\_\_\_\_\_

Did everyone on the tax return have health insurance all year long? \_\_\_\_\_

Please Confirm Direct Deposit Information:                      Checking or Savings? \_\_\_\_\_

Routing #: \_\_\_\_\_                      Acct. #: \_\_\_\_\_

Can we email or text you tax questions or feedback? \_\_\_\_\_

Can we provide you with an electronic copy of your tax return (in lieu of a paper copy)? \_\_\_\_\_

Did your phone number change? \_\_\_\_\_

Did your email change? \_\_\_\_\_

Did you receive the first stimulus payment (supporting doc)? \_\_\_\_\_

If so, what was the amount you received? \_\_\_\_\_

Did you receive the second stimulus payment (supporting doc)? \_\_\_\_\_

If so, what was the amount you received? \_\_\_\_\_

Did you purchase or own any bitcoin (cryptocurrency)? \_\_\_\_\_

Did you purchase any items online or in NH that would require Vermont Use tax?

\_\_\_\_\_

Any energy improvement upgrades in 2020? If so, please provide supporting documents. \_\_\_\_\_

Any cash charitable donations made? (\$300 can be deducted without itemizing) \_\_\_\_\_

Did you start or end a business in 2020? \_\_\_\_\_