

Additional information that may be needed to complete your tax return.

Do you pay rent? <i>If yes, please indicate monthly amount.</i>	Y/N	In 2020, did you have health insurance? Did you obtain your health insurance through the marketplace? <i>If yes, please provide 1095-A.</i>	Y/N Y/N
Are you or any of your dependents disabled? <i>If yes, please indicate who is disabled.</i>	Y/N	Did you have any medical expenses or pay for health insurance?	Y/N
Did you receive a 1099-MISC?	Y/N	Did you receive Social Security benefits?	Y/N
Did you pay alimony? <i>If yes, list name of recipient, SSN and amount. Was the settlement finalized after 2018?</i>	Y/N	Did you receive alimony? <i>If yes, list amount. Was the settlement finalized after 2018?</i>	Y/N
At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	Y/N	Do you own your home? <i>If yes, please include mortgage interest statement and property tax information.</i>	Y/N
Did you have any out of pocket expenses or use your vehicle on the job? <i>If yes, please provide information. May only apply to state.</i>	Y/N	Did you make any repairs to your principal property? <i>Please specify.</i>	Y/N
Did you or your dependent(s) take any higher education courses? <i>If yes, please include amounts paid for books, supplies, equipment and/or fees if applicable.</i>	Y/N	Did you pay interest on student loans? Did you receive the first and second stimulus ? Did you make any estimated tax payments?	Y/N Y/N Y/N
Did you move and have to pay moving expenses? <i>For members of the Armed Forces.</i>	Y/N	Do you <u>own</u> rental property? <i>If yes, please ask for Form Sch E.</i>	Y/N
Did you sell your home?	Y/N	Did you sell any other property (equipment, land, etc.)?	Y/N
Did you sell stock, mutual fund, or other securities?	Y/N	Are you currently or were you an active member in the military?	Y/N
Did you receive a statement for cancellation of debt?	Y/N	Did you make any IRA contributions? <i>If yes, was it a Roth or Traditional IRA?</i>	Y/N
Did you receive any interest or dividends from savings or investments?	Y/N	Did you collect unemployment compensation or disability?	Y/N
Did you receive pension, annuity, IRA, or retirement income (for individuals who've reached retirement age)?	Y/N	Did you withdrawal any funds from your pension plan (401K)? <i>If yes, please explain the reason for withdrawing.</i>	Y/N
Do you have any gambling winnings (lottery, race track, casinos, and/or raffles)?	Y/N	Did you make any contributions to charity, church, etc.?	Y/N
Did you have a loss from casualty (fire, theft, natural disaster)?	Y/N	Do you have any concerns that were not addressed on this questionnaire?	Y/N

Please note that if you so decide not to have your taxes prepared after we have completed, you will be charged a \$50-\$100 fee, depending on the amount of work performed. Thank you for your understanding! :) Client's Initials_____

Have a LeGrand Day!®