

Name: _____

Independent Tax & Financial Planners, P.C.

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Holland, PA 18966-1744

2020 **ITFP** 2020

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Please carefully answer the following questions. These questions will help us prepare your tax return.
You will have to send supporting documentation regarding any questions that are answered "Yes".*

1)	Y N	Do you have a preferred method of contact?	Home Phone	Cell Phone	Email
2)	Y N	Has your bank account information changed since last year? If so, please send a copy of a voided check.			
3)	Y N	Have you or your spouse updated your license in the past year? If so, please send a color copy of the license.			
4)	Y N	Are you or your spouse a US veteran who files a resident or non-resident NJ return?			
5)	Y N	Are you or your spouse legally blind?	Taxpayer	Spouse	
6)	Y N	Any life changing events that would affect your tax return?	Move	Baby	Marriage Divorce Other
7)	Y N	Did your occupation/job title change? List your new occupation/job title here: _____			
8a)	Y N	Did you work for any material length of time in a state other than where you reside? Which state(s)? _____			
8b)	Y N	Did you or your spouse work from home for your Philadelphia employer?	Taxpayer	Spouse	
9)	Y N	Any change to your dependents (Children/Parents)?			
10)	Y N	Do you have a child who will be preparing their own return? If yes, have you confirmed whether they will be claiming themselves or not?	I am claiming the child	Child is claiming him/herself	Unsure
11)	Y N	Did you have any children under age 19 or full-time students under age 24 at the end of 2020, with investment income in excess of \$2,200?			
12)	Y N	Did you receive any notices from the IRS, or from a state or local taxing authority?			
13)	Y N	Did you make any Federal, State or Local estimated payments?	Federal	State	Local
14)	Y N	Did you make gifts totaling more than \$15,000 to any individual during the year?			
15)	Y N	Did you or your spouse have any foreign assets or investments?			
16)	Y N	Did you start a new job or a new business? If yes, explain in comments section.	Job	Business	
17)	Y N	Did you have a small business for which we need to report a profit or loss?			
18)	Y N	Did you have any other sources of income? (i.e. Etsy, eBay, Uber, Airbnb, babysitting, etc.) If yes, please explain in Comments Section below.			
19)	Y N	Did you earn more than \$1.00 of interest on any bank accounts? If Yes, please include 1099INT(s) or please note Bank(s) and amount(s) here: _____			
20)	Y N	Did you receive either Stimulus payments? If yes, amount received: 1st _____ 2 nd _____			
21)	Y N	Did you have any dividend income? If Yes, please send all 1099DIV(s).			
22)	Y N	Did you sell any stocks or mutual funds? (If yes, please be aware that the cost basis will be needed.)			
23)	Y N	Did you withdraw money from your IRA or employer retirement fund for COVID-related expenses?			
24)	Y N	Were you granted stock options by your employer and/or exercised employer stock options?	Granted	Exercised	
25)	Y N	Did you have any IRA Rollovers or Transfers?	ITFP Only	I had rollovers elsewhere	
26)	Y N	Did you have any retirement accounts that require you to make a Required Minimum Distribution?	Yes, I took the RMD	Yes, but I suspended my 2020 RMD via the CARES ACT.	
27)	Y N	Do you anticipate receiving any K-1's? If so, have you received them? Yes No			
28)	Y N	Have you bought, sold, traded, spent or acquired any financial interest in any virtual currency, such as Bitcoin, during 2020?			
29)	Y N	Did you receive any unemployment compensation?			
30)	Y N	Did you have any gambling winnings or losses?	Winnings	Losses	
31)	Y N	Did you have any debts cancelled? If yes, were they related to your personal residence? Yes No			
32)	Y N	Any alimony? Paid Received Date of the agreement? _____. Date of any amendments? _____			
33)	Y N	Did you receive any social security benefits?			
34)	Y N	Did you pay child care costs for a dependent child under age 13, or costs of caring for a disabled dependent or spouse? (Must provide EIN or SSN)	Child care	Caring for disabled dependent/spouse	
35)	Y N	Did you pay any individual \$2,200 or more to perform household services during the year, such as a babysitter, caretaker, housekeeper, cook or gardener? If so, specify: _____			
36)	Y N	Any cash or non-cash charitable contributions, or charitable mileage?	Cash	Non-Cash	Mileage
37)	Y N	Did you contribute (or plan to before April 15th) to a SEP IRA, IRA, Roth IRA for 2020? Contributed Plan to If yes, were the contributions made to accounts through ITFP? Yes No			
38)	Y N	Any significant medical expenses or medical mileage?	Out Of Pocket Medical Expenses	Medical Mileage	
39)	Y N	Are you a grade K-12 teacher or aide? If yes, please provide any out-of-pocket classroom, personal protection, or professional development expenses.			

40)	Y	N	Do you pay union dues? If yes, do you have documentation to support? (i.e. W-2 or paystub showing union dues) Yes No
41)	Y	N	Are you self-employed? Do you have documentation to support your expenses (i.e. receipts, mileage log, etc.) Did you receive any COVID-related loans or grants? (Not Stimulus Payment) Were you unable to work due to Coronavirus Restrictions or Illness?
42)	Y	N	Did you have a Health/Medical Savings Account? (HSA or MSA, NOT an FSA) If yes, any activity in 2020? Contributed Withdrew Were all withdrawals used for qualified medical expenses? Yes No
43)	Y	N	Did you pay any student loan interest?
44)	Y	N	Did you have any education expenses paid in 2020 (i.e. tuition, books)?
45)	Y	N	Did you have a child/children, over the age 18, that attended college full-time for at least 5 months of 2020?
46)	Y	N	Did you contribute to a 529? If yes, were these contributions made through ITFP? Yes No
47)	Y	N	Any education distributions? (529, ESA, Coverdell). If yes, were these distributions done through ITFP? Yes No
48)	Y	N	Did you make any purchases in which you have not paid sales tax? (Online or out-of-state purchases)
49)	Y	N	Any large purchases for which you paid sales tax? (i.e. car)
50)	Y	N	Did you rent your home out for any period of time, either on your own or through a company (Airbnb)?
51)	Y	N	Did you make any qualified home energy improvements?
52)	Y	N	Did you purchase an electric car? Install a charging system? Yes No Date of Installation: _____
53)	Y	N	Did you purchase a home in 2008 and take a federal First Time Homebuyer credit?
54)	Y	N	Did you pay Real Estate Taxes or Private Mortgage Insurance (PMI)? Real Estate Taxes PMI
55)	Y	N	Did you pay rent or a mortgage? Rent Mortgage
56)	Y	N	Did you refinance, sell, or purchase a primary/vacation home/rental? Refinance Sell Purchase If yes, please send us a copy of the HUD or Settlement Sheet.
57)	Y	N	Did you have a rental/vacation home? If a rental property, did you use it personally for more than 14 days? Yes No
58)	Y	N	Did you take out a home equity loan? Date _____ Amount of Loan \$ _____ Was the home equity loan used entirely for home improvements? Yes No
59)	Y	N	If you are a resident of NJ, RI, VT, CA, MA, MD, or DC, did you have health insurance coverage for yourself and all of your dependents for the entire year?
60)	Y	N	Did you have health insurance coverage through the Marketplace and receive a 1095-A?
61)	How would you like to receive the tax return for your review and files? Please choose ONE of the following: CD Thumb drive (\$5 fee) Paper ShareFile Portal		
62)	PLEASE NOTE: If you have accounts with online access, check online for tax documents. Some companies no longer mail hard copies of tax documents. Acknowledged I have no accounts with online access		
PLEASE ANSWER ALL QUESTIONS			
If using Google Chrome or a web browser to fill in this PDF, use the Print button and select "Save as PDF" to save your selections.			
If indicated above, remember to send a voided check, color copy of license, settlement sheet, etc.			

COMMENTS:

Is there anything else we can help you with, regarding taxes or financial planning?

Check out <https://itfp.com/whats-new/> or <https://itfp.com/tax-planning/> for the latest in tax law changes.
We encourage you to make www.itfp.com a favorite in your Web Browser.

*We are taking extra steps to ensure that our clients' information remains secure. We encourage all of our clients to avoid sending sensitive information and documents via unsecure email.

We recommend uploading your documents to an individual ShareFile that we can create for you. If you are unable to use ShareFile, please mail your documents or drop them off in our office mailbox, located at the rear of our building.

If you would like to send your information via ShareFile, please contact Tom O'Malia at TomOmalia@ITFP.com to set up your secure individual ShareFile.