

Name:	First	M.I.	Last	DOB	Phone
Taxpayer					
Spouse					

Email:

Mailing Address: Street, City, State, ZIP

Street:

City:

State:

ZIP:

Marital Status:

- Single/Never Married
 Married Live together in 2020?
 Divorced Date:
 Widowed Date:

Please check if applicable:

- US Citizen?
 Blind?
 Permanently and totally disabled?
 Full-time student?
 Can you be claimed as a dependent?

Taxpayer Spouse

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Dependent Information:

First Name	M.I.	Last Name	DOB	Relationship	Months in home	Disabled	Student
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>

Identification:

- I have included copies of Photo Identification for Taxpayer and Spouse.
 I have included copies of SS cards, ITIN letters, or similar document for everyone listed above.

Refund or Payment Due:

Bank	Routing #	Account #	Checking?	Savings?	Debit?	Deposit?	% or \$
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Healthcare Information:

- Did you purchase insurance through Healthcare.gov or a state marketplace (MNSure.org)?
 Include Form 1095-A.

Income Information:

- Did you receive wages or salary as an employee? How many jobs did you have? # of jobs
 Include all W-2s or complete [Form 4852](#) for each job.
 Did you receive any wages or tips not reported on Form W-2?
 Include amount not on [Form 4852](#) \$ amount
 Did you receive any scholarships?
 Include Form 1098-T, Form W-2, Form 1099-Misc, or Form 1099-NEC.
 Did you receive interest or dividends from a bank account, bond, CD, or brokerage?
 Include Form 1099-INT, Form 1099-DIV, and amount not on forms. amount not on forms
 Was any interest or dividends from US treasury or municipal bonds?
 Include records on which accounts include this income.
 Did you receive a refund of state/local taxes **AND** itemize deductions that tax year?
 Include Form 1099-G and prior year return.
 Did you receive alimony or spousal/separate maintenance payments from a pre-2019 decree?
 Include annual total. \$ amount
 Did you receive any income as an independent contractor or from self-employment?

- Include Form 1099-NEC and complete [Self-Employment Organizer](#).
- Did you receive payment for work not reported on a W-2 or 1099 such as cash or check?
Include record and description of what the income was from.
 - Did you own or start a business during the year?
Complete [Self-Employment Organizer](#) and include prior year return if ongoing business.
 - Did you sell any stocks, bonds, real estate, or other property?
Include Form 1099-B, Form 1099-S, Form 1099-A, or other records.
 - Did you acquire, trade, or sell a Virtual Currency, such as Bitcoin or Ethereum?
Include records of acquisitions, sales, and trades not included on Form 1099-B.
 - Did you receive any payments related to a disability?
Include Form 1099-R, Form W-2, Form SSA-1099.
 - Did you receive any payments from a retirement account, pension, or annuity?
Include Form 1099-R or Form RRB-1099-R.
 - Did you receive unemployment compensation?
Include Form 1099-G.
 - Did you receive any Social Security or Railroad Retirement Benefits?
Include Form SSA-1099 or Form RRB-1099.
 - Did you receive any payments from rental property?
Include Form 1099-Misc or other records.
 - Did you receive any prizes, awards, or gambling winnings?
Include Form W-2G, Form 1099-Misc, or other records.
 - Did you receive any other income not listed above?
Include records or questions relating to the income.

Expense Information:

- Did you pay any alimony or spousal/separate maintenance for a pre-2019 decree?
Include recipient's SSN _____ and amount \$ amount.
- Did you contribute to a retirement account?
Include Form 5498 or other records and type of account.
- Did you pay any college or post-secondary education expenses for yourself or a dependent?
Include Form 1098-T, records of other expenses, number of years attended, and if any educational tax credits have been claimed in prior years.
- Did you make any student loan payments toward a loan you are legally obligated to pay?
Include 1098-E, other records of payments and interest, and student name.
- Did you pay any medical expenses including health insurance premiums?
Include records and complete [Itemization Organizer](#).
- Did you pay any state or local taxes such as property or income taxes?
Include records and complete [Itemization Organizer](#).
- Did you pay any mortgage interest on a primary or secondary home?
Include Form 1098 or other records and complete [Itemization Organizer](#).
- Did you make any charitable contributions during the year?
Include records of contributions and complete [Itemization Organizer](#).
- Did you pay for any child or dependent care such as daycare?
Include records of the amount paid, provider EIN, and who the care was for.
- Did you purchase any supplies to be used as an eligible educator such as teacher or counselor?
Include records of purchases.
- Did you have expenses related to self-employment or independent contractor income?
Include records and complete [Self-Employment Organizer](#).
- Did you have expenses related to income not listed above?

Events Affecting Taxes:

- Were you Self-Employed and unable to work because of a Covid-19 lockdown order, quarantine, school/childcare closed, or needed to care for yourself or family member diagnosed with or suspected of having Covid-19?
Include information on the dates covered and the situation.
- Did you receive any Economic Impact Payments (stimulus) in 2020 or 2021?
Include amounts received.
- Was your earned income lower in 2020 than in 2019?
Include 2019 tax return.
- Did you contribute to or receive distributions from a Health Savings Account?
Include Form 1099-SA, Form 5498-SA, and records of qualifying expenses.
- Did you contribute to or receive distributions from an Education Savings Account?
Include Form 1099-Q, Form 5498-ESA, and records of qualifying expenses.
- Did you declare, finalize, or have an ongoing bankruptcy during the tax year?
Include records relating to bankruptcy declaration, debt discharge, and tax returns.
- Did you have any debt forgiven or cancelled during the year?
Include Form 1099-C or 1099-A and records of what the debt was for.
- Did you file a return with a "capital loss carryover" last year?
Include prior year return.
- Did you live in a federally designated disaster area?
Include records of lost property due to disaster.
- Did you receive the First Time Homebuyers Credit in 2008?
Include information relating to the credit received.
- Did you make any estimated tax payments or apply your last year's refund to this year's taxes?
Include records of payments.
- Are you a member of a federally recognized Indian tribe?
Include information about the sources of income and if living on a reservation.
- Are you a member of the US Armed Forces, including reservists?
Include information on combat pay and other income/expenses related to service.
- Did you adopt a child?
Include records of unreimbursed adoption expenses.
- Have you ever had the Earned Income Credit, Child Tax Credit, or American Opportunity Credit disallowed in a prior year?
Include information on why the credit was disallowed.
- Have you received a letter from the IRS or a state taxing authority?
Include the letters you received.
- Any other questions about if something will affect your tax situation?
Record questions for discussion with the rest of the documents.

Foreign Accounts:

- Are you the signatory or have a financial interest in an account or asset located outside the US?
 - Was the aggregate value of your foreign accounts over \$10,000 at any time in the year?
You may be required to complete a Foreign Banks and Financial Accounts report (FBAR). This form is filed separately from your taxes and can be found on [fincen.gov](https://www.fincen.gov).
Evans Legal Services PLLC cannot file this form for you.
- Did you receive any income from a foreign source?
Include records of type of income and where it came from.
- Did you pay taxes on income to a foreign country?
Include records of the taxes paid and which country it was paid to.