

**2020 ANNUAL TAX QUESTIONNAIRE FILLABLE PDF**

- PLEASE -

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Name, Email, Phone #
Who usually prepares your return?
Did your marital status change in 2020?
Did the number of your dependents change in 2020? If yes, please describe:
Did your address change from last year? If yes, please provide new address:
Did your phone number change from last year? If yes, please list your OLD phone number:
Did you have your health insurance through the Health Care Exchange? (Obama care)
Did your bank routing and account number change? If yes, please provide your new one:
Did you have any foreign financial accounts in 2020? If yes, what was the highest account balance in US dollars? How much interest did you earn last year in the foreign account in US dollars?
At anytime during 2020 did you receive, sell send, exchange or otherwise, acquire any financial interest in any virtual currency (for example Bitcoin)?
Did you take any money out of a Health Savings account last year? If yes, please list the amount:
What is the exact amount you received for the first stimuli last year? (We need the exact amount, or your return will be delayed in processing up to 3 months)
What is the exact amount you received for the child tax credit advance?
How much cash charity did you give last year?
Did you have any Daycare expenses last year?