

2020

1040

US

## Miscellaneous Questions

Please check the appropriate box if any of the following items pertain to either you or your spouse for 2020. Provide additional information if necessary.

- | N/A                      | Yes                      | No                       |  |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change in 2020?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents in 2020?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did all your dependents live with you the entire year? If no, please explain.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? If yes, move date: _____<br>New address: _____  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did any drivers license information change during the year? If yes,<br>DL# _____ Issue date _____ Expiration date _____  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did your bank account information change since your last filed tax return?<br>If yes, Routing # _____ Account # _____  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive an identity theft pin #? If yes, please provide _____  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any taxable disability income?   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any unemployment income?   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive an economic stimulus payment?<br>If yes, how much? _____   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | At any time during year did you receive, sell, send, exchange, or otherwise<br>acquire any financial interest in any virtual currency? i.e. Bitcoin.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Do you have interest in or signature authority over any foreign bank account(s)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did<br>you take a home equity loan? If you took out a home equity loan, please indicate<br>what the funds were used for _____. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any residential energy-efficient improvements or purchases<br>including windows, doors, insulation, solar, wind, geothermal or fuel cell<br>energy sources?                                   |

Continued...

2020

1040

US

## Miscellaneous Questions

N/A Yes No

- Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?
- If you received a distribution from your retirement plan, was the withdraw qualified under the CARES act?
- Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2020?
- Would you, or your spouse, like to contribute to a traditional IRA to reduce tax?
- Did you, your spouse, or a dependent(s) incur any tuition expenses that are required to attend a college, university, or vocational school?
- Was your primary residence rented out or used for business?
- If your business has employees did you file W-2's timely? If not run by CORE, please provide copies of W-2's and 941 forms.
- Did your business receive a PPP grant or loan? If yes, please provide the forgiveness letter from your bank.
- Did your business receive an EIDL loan? If yes, please provide loan documents.
- Did you receive any other funds/grants as a result of COVID-19? If yes, please provide documents.
- Were you notified or audited by either the Internal Revenue Service or the State taxing agency? If yes, please provide a copy of the letter(s).
- Did you make estimated tax payments? If yes, please attach payment details.
- Did you purchase health insurance coverage for yourself or your dependents through the Federal or State marketplace? If yes, please attach form 1095-A.
- Did you donate money to a 501(c)(3) charitable organization? If yes, please provide donation letter(s).
- Excluding 501(c)(3) charitable donations, did you gift more than \$15,000 to an individual or non-qualified charity?

I attest all questions are answered correctly:

Signature: \_\_\_\_\_

Date: \_\_\_\_\_