# Business Management Company
# Personal Tax Checklist - Portal

Received by_PORTAL___

***Returning clients update shaded areas only***

Tax Year 2019

| | | | |
|---|---|---|---|
| New Client? How did you hear about us? | | | Today's Date |
| Taxpayer: | Filing status | D.O.B. | SSN |
| Spouse: | | D.O.B. | SSN |
| Dependents 1 | | D.O.B. | SSN |
| 2 | | D.O.B. | SSN |
| 3 | | D.O.B. | SSN |
| 4 | | D.O.B. | SSN |

| | | |
|---|---|---|
| Address: | Phone:primary | Phone:secondary |

| | | |
|---|---|---|
| | County/Boro/School Dist | Email address: primary |
| Taxpayer Occupation | Spouse Occupation | Email address: secondary |

| | | | | |
|---|---|---|---|---|
| Direct Deposit Routing | Bank | Account# | IRS issued PIN? | Paper copy/Portal |

| | Yes | No | | | | |
|---|---|---|---|---|---|---|
| Did you buy health insurance through state market place? | | | Federal estim tax payments | State estim tax pymts | | |
| If so did you receive form 1095-A? (state health insurance) | | | Q1 | Q1 | | |
| Are you interested in Retiremet/Financial Planning Services? | | | Q2 | Q2 | | |
| Do you have dependents who must file a return? | | | Q3 | Q3 | | |
| Did you buy or sell a home in 2019? | | | Q4 | Q4 | | |
| Did you refinance your home in 2019? | | | Do you contribute to a 529 plan? | | Yes | No |
| Do you have a Home Equity Loan? | | | State: | Amount: | | |
| If yes, what were the proceeds used for? | | | Would you like to use esignature? | | | |
| Do you own a business? | | | Paper copy of Return? | | | |
| If yes, do you pay yourself rent? | | | Portal delivery of return only? | | | |
| Did you or your spouse have self-employed health insurance? | | | | | | |
| Do you own or control a foreign bank account(s) that aggregate > $10,000? | | | | | | |
| Did you take a Home buyer credit in a previous year? | | | | | | |
| Did you make contributions to an IRA? (individual account, not through work) | | | | | | |
| Did you make tax deductible contributions to an HSA? (Health savings acct) | | | | | | |
| Did you pay or receive alimony? (post 2018) | | | | | | |
| Did you receive a 1099-C? (relief of debt) | | | | | | |
| | | | | | | |