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Business Management Company
Personal Tax Intake Sheet

Returning clients update new information only or use SALY (same as last year)

Tax Year 2020

New Client? How did you hear about us?	Today's Date

Taxpayer	**Spouse**
Name	Name
Occupation	Occupation
SSN Date of birth	SSN Date of birth
Phone	Phone
Email address	Email address
Address	
City State	Zip
County/Boro/School Dist	
Bank Routing Bank	Account IRS Issued IP PIN

Dependents

Full name Relationship	Date of birth	SSN	tuition/childcare

Return Level Entry Proficient Expert

2020 Changes, important events or transactions

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***** Please answer all questions***

	Yes	No
Did you receive stimulus payment(s) in 2020? 1st amount _____________ 2nd amount _____________		
Did you buy health insurance through state market place?		
If so did you receive form 1095-A? (state health insurance)		
Did you have any virtual currency transactions in 2020? (Bitcoin, etc..)		
Did you buy or sell a home in 2020?		
Did you refinance your home in 2020?		
Do you have a Home Equity Loan?		
If yes, what were the proceeds used for?		
Did you receive or pay alimony in 2020?		
Do you own a business?		
Can you be claimed on another person's return?		
Did you or your spouse have self-employed health insurance?		
Do you own or control a foreign assets or a bank account(s) that aggregate > $10,000		
Did you make contributions to an individual IRA? (not through work)		
Did you convert a traditional to a Roth IRA in 2020?		
Did you make tax deductible contributions to an HSA? (Health savings acct)		
Did you receive a 1099-C? (relief of debt)		
Do you contribute to a 529 plan? What state?		
Are you a grade K-12 teacher?		
Did you pay childcare expenses for a dependent?		
Did you pay expenses related to an adoption?		
Did you exercise employee stock options in 2020?		
Do you own any securities that became worthless in 2020?		
Did you travel as a National Guard member in 2020?		
Did you purchase a new plug-in vehicle in 2020? Make Model Date		
Were you active duty military in 2020?		
If yes, did you have moving expenses?		
Portal delivery of return only?		
Did you purchase any energy efficient improvements to your home?		

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Tax Preparation Checklist

Please provide the following documents:

- ☐ All forms W-2 (wages), 1099-INT (interest), 1099-DIV (broker transactions), 1099-NEC (1099-R pensions and IRA distributions), Schedules K-1 (partnerships, S-corporations & Trusts) and other income reporting statements.
- ☐ Form 1095-A (for health insurance purchased through a public exchange)
- ☐ If you are a new client, provide copies of last year's tax returns.
- ☐ Copy of closing statement if you bought or sold real estate.
- ☐ Mileage figures for any automobile expenses claimed, including total mileage, commuting mileage and business mileage.
- ☐ Detail of estimated tax payments made, if any.
- ☐ Income and deductions categorized on separate sheet for business or rental activities.
- ☐ List of itemized deductions categorized on a separate sheet for medical, taxes, interest & charitable deductions.

Tax Return Preparation

- We will prepare your tax returns based on the information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing review, or any other verification or assurance.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your compled tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records.
- In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority.
- We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand and accept your obligations and responsibilities.
For a joint return both taxpayers must sign.

Taxpayer	*Spouse*	*Date*

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third part without your permission, except where required by law. We maintain physical, electronic, and and procedural safeguards in compliance with federal regulations that protect your person information from un authorized access.