

Please answer all that apply to the current tax year.

TAX YEAR 2020

TAXPAYER & SPOUSE NAME _____

BEST CONTACT PHONE NUMBER _____

EMAIL ADDRESS _____

1. If any of the following have changed since we last prepared a return for you, please fill out an Information Change Form:
Address New Dependent Remove Dependent Marital Status Death of a Spouse or Dependent

2. Did you receive any unemployment compensation in 2020? Yes No

If the answer is "Yes", you will need to download and print Form 1099G at www.jobs4tn.gov. We cannot complete your return without it.

3. How much money did you receive in the first stimulus payment? \$ _____

4. How much money did you receive in the second stimulus payment? \$ _____

5. Was your income in 2020 less than in 2019 due to job loss or underemployment? Yes No

6. For 2020 only, it is possible to deduct up to \$300 in qualified contributions without itemizing. How much were your charitable contributions in 2020(IRS requires documentation from the charity)? \$ _____

7. Do you or your spouse, if applicable, have signing authority on a foreign bank account, or did you receive a distribution from, or were grantor of, or transferor to, a foreign trust?
 Yes No

8. Are you or your spouse, if applicable, required to repay a 2008 First Time Home Buyers Credit?
 Yes No

9. Did you, your spouse, or any dependents receive health insurance through a federal or state exchange (aka ObamaCare) in 2020?
 Yes No

If the answer is "Yes", we will need your Form 1095-A before we can complete your return

10. During 2020, did you or your spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (Bitcoin, for example)?
 Yes No

11. If you are due an income tax refund and would like the amount direct deposited to your bank account, please enter the following information:

Routing Number _____ Bank Name _____
Account Number _____ Checking Savings

12. If you can claim mileage for a business, rental, farm, or partnership, please use our business expense worksheet. NOTE: Unreimbursed Employee Expenses are no longer deductible.

13. Answer the following only if you had a business, rental property, or farm:

a. Did you make any payment in 2020 that would require you to file Form(s) 1099? Y N

b. If "Yes", did you or will you file the required Forms 1099? Y N

For more information about 1099 filing requirements and penalties, visit www.mefcpas.com.

14. Other items to discuss: _____

Please present your driver's license or state ID to the receptionist.