

QUESTIONNAIRE 2020

Please check the appropriate box and include all necessary details
When in doubt, please check the "Not Sure" box so that we can discuss the issue with you.

Name: _____ Spouse's Name _____

Contact Information

E-mail address(es): _____ or I don't use e-mail

Phone Numbers (just enter the one(s) you would like us to use)

Home number: _____ Work or Cell number: _____ Other _____

How do you prefer to be contacted? E-mail Phone—circle best number.

Personal Information

Did you marry, divorce, separate or become widowed during the year? Yes No Not Sure

Did your address change since last year? Yes No Not Sure

New Address: _____ Date Moved: _____

Do you live with parents, relatives or friends or depend on them to pay your bills? Yes No Not Sure

Do you want to **change** the bank account where any refund gets directly deposited? Yes No

If yes, **please attach a voided check (not deposit slip.)** The IRS is discouraging taxpayers from paying any estimated payments or tax due by mailing a check. If you owe taxes or pay estimates, please choose one

- paying by scheduled direct debit* (we enter your bank info but you verify it)
- paying on line
- mailing a check (still available but should be avoided. Some 2019 payments are not yet processed!)

*If you owe and may be subject to penalty, paying by direct debit cuts your penalty from 5% to 2.5%

How do you want your copy of your return? Paper copy PDF uploaded to our secure portal Both

If you gave us original materials (W-2, 1099s) or want a paper copy, would you prefer we mail your original paperwork to you or would you like to pick it up? Our **office is closed** to the public but you can come to the porch to pick up between 9 and 5 M-F (during February, March and until April 15, until 7pm and Sat 10-2) or by appointment.

Purchases, Sales and Debt Information

Did you start a **new business or purchase rental property** during the year? Yes No Not Sure

Did you **sell, exchange, or purchase any real estate** during the year? Yes No Not Sure

Did you **buy or sell stock** during the year? (We need the 1099) Yes No Not Sure

Did you **sell a business, rental, or other property** this year? Yes No Not Sure

Did you have any debts canceled, such as credit card bills,
 or pay less than the full amount? Yes No Not Sure

Did you pay any **student loan** interest this year? Please give us the 1098-E Yes No Not Sure

Did you **lend \$10,000 or more** to anyone or lend any amount for a mortgage? Yes No Not Sure

Other Income Information

Do you receive or pay Alimony? Received \$ _____ Paid \$ _____ Yes No Not Sure

If yes, check here if we already have a copy of your divorce order or **please get us a copy.**

Because of a change in the law this year, we are required to report the date of the order.

Do you have any income from hobbies or odd jobs? Yes No Not Sure

Please check "Yes" or "Not Sure" if you sell produce or farm products (and you are not a farmer), sell items through home parties, get paid to teach classes, monitor tests, sell items online, or sell craft items. ALL INCOME GREATER THAN 49¢ (it gets rounded up to \$1) MUST BE REPORTED.

Describe briefly: _____

Did you win any **prizes** (not just **money**) from bingo, raffles, gambling or fantasy sports?

Yes No Not Sure If yes or not sure, describe _____

Did you withdraw or receive any money from any **retirement** account? Yes No Not Sure

Did you withdraw money from an **education savings** (529) plan? We need 1099Q Yes No Not Sure

Did you receive any **disability** income during the year? Yes No Not Sure

Did you receive an **inheritance** recently or do you expect one this year? Yes No Not Sure

Did you receive **tip income not reported to your employer**? Yes No Not Sure

Did you cash in any life insurance policies or U. S. Savings Bonds? Yes No Not Sure

Do you own a second residence or any other real estate? Yes No Not Sure

Do you rent out a room, home or RV short-term such as through Airbnb? Yes No Not Sure

Did you buy, trade or receive as a gift cryptocurrency (like Bitcoin)? Yes No Not Sure

At least one local company was giving it away. Please mark yes if you got some.

Medical Insurance--Affordable Care Act--Obamacare

If your Medical insurance was through Vermont Health Connect or the Healthcare Exchange (Obamacare) **please check here** **and make sure you bring us your form 1095A** which lists your premiums paid and any assistance you got. If you are SURE you received no premium assistance, check here

Miscellaneous Information

Did you **make gifts** of more than \$15,000 to any individual? Yes No Not Sure

Did you change the deed on your home to give a share to anyone else (your children)? Yes No Not Sure

Did you make any contributions to the Vermont (VHEIP) education savings plan (529)? Yes No Not Sure

Did you retire, **start drawing social security** or change jobs in 2020? Yes No Not Sure

Do you **plan to retire** or start drawing social security in the current year? Yes No Not Sure

Did you purchase any solar energy panels or a geothermal pump in 2020? Yes No Not Sure

(If yes, please give us a copy of the receipt or tell us the total cost)

Did you install new windows, doors or skylights in your home? Yes No Not Sure

Did you buy a new car or 2 wheeled vehicle that runs on electricity? Yes No Not Sure

Did you lose property in a federally declared disaster area during the year? Yes No Not Sure

Foreign Asset Reporting

Did you have any foreign income or pay any foreign taxes during the year? Yes No Not Sure
(Answer "NO" if you only have foreign stock through a US brokerage/investment account)

Have you ever lived or worked in, or were you born in, or do you have any connection with any **foreign countries** (including Canada) such as bank accounts, real estate owned, relatives or close friends living abroad, or any interest in a foreign bank account, corporation or partnership or do you work somewhere (such as World Learning) and have signatory authority over accounts in another country? Yes No Not Sure

Do you or will you have retirement benefits from another country? Yes No Not Sure

Have or will you inherit money or property from another country? Yes No Not Sure

***If "No" initial here: _____ and skip the foreign interest questions.

If you answered "Yes" or "Not Sure" please fill out the **Foreign Interest Questionnaire attached**.

Notices

Did you get any unexpected letter from a state tax department or the IRS? Yes No Not Sure

If yes, please give us a copy or explain: _____

Covid/Pandemic Questions:

Charitable Contribution—Everyone can deduct up to \$300 (\$600 for a married couple) of donations, even if they do not itemize. Please report this on the Credits & Deductions form.

Stimulus Payment

(Please note: **you do not pay tax on the stimulus payment.** We do need to “reconcile” it on your 2020 return so that, if you did not get it but should have, you will get it on your 2020 return.)

Did you receive a stimulus payment in 2020 and/or 2021? Yes No Not Sure

If no, do you know why not? _____

If yes, how much did you receive? _____

Please give us a copy of the letters you received setting out the amount;

If you cannot find the letter or do not know if you received a payment or cannot remember the amount, please go on line and check and either print or copy down the information.

<https://www.irs.gov/coronavirus/get-my-payment> You will need your social security number, date of birth, street address and zip code.

If you do not have a copy of the letter, and you have no internet access, please check here and your preparer will call you to see what we can figure out.

Other Covid relief:

Did you receive unemployment compensation this year? Yes No Not Sure

You should receive a 1099-G. We must have a copy.

Did you receive any grants or loans because of the pandemic? Yes No Not Sure

Please give us forms and information with your other self-employment income.

Retirement Accounts:

Required Minimum Distribution (RMD) Skipped?

If you are over 70 ½ and usually take a required distribution from a retirement account but did not this year because of the option to skip it, please check here

If you took an RMD but then put it back by August 31, please check here.

If you took money (or extra money) from a retirement account BECAUSE OF THE PANDEMIC please check here

Did you work from home or from another location that is different from your usual place of work?

Yes No Not Sure

Please describe: _____

New Hampshire Residents: (Vermont residents skip to the next page)

If you live in and worked from NH when you usually work in VT or MA or another state, you may pay less in tax to the other state. Please let us know:

Total number of days you worked in the year: _____ (5 days a week all year with 2 weeks Vacation would be 250 days.)

Number of days you worked in the non-NH state: _____

Number of days you worked from home in NH: _____

If you live in **New Hampshire**, sign below:



Signature _____ **Date** _____





Vermont Residents Only

Property Tax Assistance or Renter's Rebate:

1. If you **rented** a house or apartment and your income might be less than \$47,000 check this box Make sure you give us your landlord certificate and go to **Household Income**, below.
2. If you **own** your Vermont home please give us a **copy of your 2020 property tax bill**, check this box and go to **Household Income**, below.
3. If you know you don't qualify for either, check this box and go to **Use Tax** below.

Household Income: (Skip this section if you do not want property tax assistance or a renter's rebate.)
 Please list everyone (other than you and your spouse) who lived in your home at any time during 2020:

_____	_____	_____	Please give us a copy of their income tax if they filed one.
Name	Relationship	Income	

Include kids and roommates (but not pets) and friends and family members even if they did not live with you all year.

Snow Birds: did you RENT OUT your VT home during 2020? Yes No Not Sure

Do you or any household members receive or pay child support? Yes No Not Sure

Did you or any household members receive any of the following: (check any that might apply) or NONE

- Veterans Benefits Military Allowance Hobby Income Gifts over \$6500
 Workers Compensation Welfare (not including food stamps or fuel assistance) Lottery or other prize (of any amount)

Did any of your dependent children **earn** (from a job) more than \$6,500? Yes No Not Sure

Did your dependents have **any unearned income** (social security, bank interest)? Yes No Not Sure

Use Tax:

Use tax is due on items you purchase without paying sale tax and then USE in Vermont. There is a good video explaining this here: <https://tax.vermont.gov/individuals/income-tax-returns/use-tax> This includes items purchased in NH or online or from a catalogue where the seller doesn't collect sales tax. **If you shop at Walmart in Hinsdale or Target in Keene for anything other than clothes, prescriptions and food, you owe use tax.** Amazon is now collecting sales tax from Vermont customers but not all of their vendors do. Here are your choices:

Adjusted Gross Inc		Tax
Up to	\$20,000	\$0
\$20,001	\$30,000	\$10
\$30,001	\$40,000	\$15
\$40,001	\$50,000	\$20
\$50,001	\$60,000	\$25
\$60,001	\$70,000	\$30
\$70,001	\$80,000	\$35
\$80,001	\$90,000	\$40
\$90,001	\$100,000	\$45
Over \$100,000 0.05% of AGI		

- I CERTIFY that I NEVER buy anything which would require me to pay use tax (we will enter \$0)
 I kept track and here is the total amount I spent on which I owe use tax: \$ _____
 I estimate that I bought \$ _____ worth of stuff on which I owe use tax.
 Please use the "safe harbor" chart at the left to figure my use tax. Tax is half what it was last year!

If you use the safe harbor, you must add any single item that cost \$1,000 or more. Check here if you bought any one thing costing \$1,000 or more in a sales-tax-free situation.

Would you like to contribute to any of the following (to be deducted from your refund or added tax due)?

Green Up \$ _____ Children's Fund \$ _____
 Nongame Wildlife Fund \$ _____ Veterans Fund \$ _____

Would you like any refund you get applied to your property tax?

Yes No Not Sure



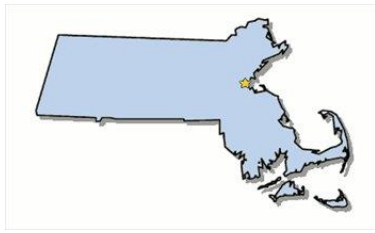
Signature _____

1/11/21

Date _____

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Massachusetts Residents Only

Rent & Senior Circuit Breaker Credit:

Do you rent your house or apartment? Yes No If yes, how much for the year? _____

Name and address of your landlord(s): _____

Does anyone else (other than your immediate family) live with you? _____

If you are at least 65 as of 1/1/21 and OWN your home, check here:

Medical Insurance:

Did everyone in your household have medical insurance for all of 2020? Yes No Not Sure

If your insurance was through through **Medicare** or **Medicaid**, **Check here:**

If your insurance is through a Massachusetts employer, please give us the forms you would have received from them.

Use Tax:

Use tax is tax due on items you purchase without paying sale tax and then USE in Massachusetts. This includes items purchased in NH or online or from a catalogue where the seller doesn't collect sales tax. **If you shop at Walmart in Hinsdale or Target in Keene for anything other than clothes, prescriptions and food, you owe use tax.** Amazon is now collecting sales tax from Massachusetts customers but not all of their vendors do. (For more information about this ask your preparer or go to: <https://www.mass.gov/service-details/individual-use-tax>)

Mass AGI Per Return*	Use Tax liability
\$0 - \$25,000	\$0
\$25,001 - \$40,000	\$20
\$40,001 - \$60,000	\$31
\$60,001 - \$80,000	\$44
\$80,001 - \$100,000*	\$56

If the Massachusetts AGI per return* is above \$100,000, multiply by .000625.

Massachusetts still wants your **Driver's license** or ID information: Number: _____
Issue date: _____ Expiration date: _____

Here are your choices:

- I CERTIFY that I NEVER buy anything which would require me to pay use tax (we will enter \$0)
- I kept track and here is the total amount I spent on which I owe use tax: \$ _____
- I estimate that I bought \$ _____ worth of stuff on which I owe use tax.
- Please use the "safe harbor" chart at the left to figure my use tax.

If you use the safe harbor, you must add any single item that cost \$1,000 or more. Check here if you bought any one thing costing \$1,000 or more in a sales-tax-free situation.

Charitable Contributions:

Would you like to contribute to any of the following MA charities? (to be deducted from your refund or added tax due)

Organ Transplant Fund \$ _____ HIV & Hepatitis Fund \$ _____ US Olympic Fund \$ _____
Endangered Wildlife Fund \$ _____ Military Family Relief Fund \$ _____ Homeless Animal Care \$ _____



Signature _____ Date _____

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Residents of All **Other** States

(Not VT, NH or MA)



In which state do you live? _____

(This is not always a simple question. If you are not sure, talk with your preparer about this.)

NY residents: we need your current driver's license number, issue date, expiration date and document number.

We are familiar with other states' income tax requirements and able to prepare returns from most states.

Although we will research your state's requirements before completing the return, if you are aware of any particular quirk or benefit available, please let us know about it.

If you are a resident of any state **OTHER THAN**

- Alaska.
- Delaware.
- Montana.
- New Hampshire.
- Oregon.
- Massachusetts or
- Vermont

Please complete the following:

Use Tax

Use tax is tax due on items you purchase without paying sale tax and then USE in your home state. This includes items purchased in NH or online or from a catalogue where the seller doesn't collect sales tax Amazon is now collecting sales tax for many states but not all of their vendors do. (For more information about this ask your preparer or google "individual use tax" with the name of the state.)

Here are your choices:

- I CERTIFY that I NEVER buy anything which would require me to pay use tax (we will enter \$0)
- I kept track and here is the total amount I spent on which I owe use tax: \$ _____
- I estimate that I bought \$ _____ worth of stuff on which I owe use tax.
- Please tell me more about the "safe harbor" in my state to figure my use tax.

If you are self-employed, and you bought anything in a sales-tax-free situation, check here

Signature _____ **Date** _____

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Skip this page

If you initialed the bottom of page 3
(because you have no foreign connections.)

Foreign Interest Questionnaire-2020 tax year

Please check the appropriate box and include all necessary details.

Please note that these questions do not apply if your only foreign interest is **THROUGH A U.S. BASED investment firm.**

Do you have a bank account in any country other than the United States? Yes No Not Sure
If "Yes," did the total assets exceed \$10,000 at any time during the year? Yes No Not Sure
If "Yes," please gather records of bank names and addresses and account numbers and maximum balances and ask for the foreign issue worksheet to see what information we will need.

Can you sign checks for any accounts that were opened in any country other than the United States?
Yes No Not Sure

Do you have any relatives or close friends who live abroad? Yes No Not Sure
If "yes," is it possible that they have added your name to a bank account? Yes No Not Sure
Is it possible that you have been given Power of Attorney or a similar authority for them?
Yes No Not Sure

Do you receive a foreign pension or other benefits or payments from a foreign country or do you have a foreign pension you are not drawing yet?
Yes No Not Sure

Are you the beneficiary of a trust located in a foreign country? Yes No Not Sure
Did you receive a gift or inheritance from anyone living in a foreign country?
Yes No Not Sure

Do you own (or have a share in) real estate in a foreign country? Yes No Not Sure
Do you have a life insurance policy or own an annuity in a foreign country?
Yes No Not Sure

Do you have an interest in a corporation or other business entity located in a foreign country
other than through a US based investment company? Yes No Not Sure

Please note that the penalties for failure to disclose foreign interests are severe and can include forfeiture of the account and jail though there may be amnesty programs available. Please ask us for additional information.