



INDIVIDUAL TAX ORGANIZER/QUESTIONNAIRE

AFairchild PC

Please Complete and Upload to AFairchild's Portal

www.afairchildpc.com

For assistance, please contact rebecca.james@afairchildpc.com

214-731-7664 (office) or 972-978-3108 (direct)

Name: _____

If this is your first year with AFairchild, please list names and birthdays		
	Date of Birth	
Taxpayer		
Spouse		
Dependent(s): List Names		
Address and Phone #		
Street Address or PO Box:		
City:		
State:		
Zip Code:		
Taxpayer Phone:	Email Address:	
Spouse Phone:	Email Address:	
General	Yes	No
If this is the first year for us to prepare your return, please provide a copy last years return.		
Did your marital status change this year?		
Have your dependents changed this year?		
Did any of your dependents have unearned income of \$1,100 or more (\$350 of Self-Employed Income)?		
Did you move? If yes, provide new address. If home bought and/or sold, provide the settlement sheet (Closing Disclosure) and Form 1099-S (if received)		
Were you a resident of, or did you have income from, more than one state during the year?		
Did you give gifts of more than \$15,000 to one individual?		
Has the IRS or any tax agency notified you of changes to a prior year tax return? If yes, please provide copy of letter received.		
Did you or your dependents receive a Federal IP PIN from the IRS or have you been the victim of identity theft? If yes, please provide a copy of the IRS notice.		
Did you or your spouse receive the 2020 Economic Impact Payment? If yes please provide amount received. If you received Form 1444, please provide us a copy.		
Did you receive the SECOND Round of 2020 Economic Impact Payment? If yes please provide amount received. If you received Form 1444B, please provide us a copy.		
Did you or your dependents enroll in health insurance through the Marketplace? If yes, please attach Form 1095-A.		
Income	Yes	No
Have you provided all W-2s?		
Did your employer elect the deferral of the employee portion of social security tax for the last four (4) months of 2020?		
Did your employer exclude from your salary any payments for student loans?		
Have you provided all 1099s? (Including Brokerage Statements)		
Have you provided all K-1s?		
Did you withdraw amounts from an IRA to acquire a personal residence or pay for unreimbursed medical expenses or higher education expenses?		
Did you withdraw amounts from an Retirement Plan because you were directly or indirectly affected by COVID?		
Did you convert IRA fund or any qualified plan funds into a Roth IRA?		
Did you receive any unemployment compensation?		
Did you receive any alimony during the year?		
Did you have any business income? Make sure to include ALL income and expenses. After a preliminary review, we will call to discuss specific items. (please complete the business form)		
Did you have any rental or royalty income?		
Did you receive Social Security Benefits? If yes, attach Form IRS-SSA		

Adjustments	Yes	No
Did you or your dependents attend college? If yes, how much did you pay for tuition, books and fees?(Please provide Form 1098-T)		
Did you pay any alimony during the year?		
Did you, or do you plan to, contribute to a traditional or Roth IRA?		
If you have self-employment income, would you like to contribute to a retirement plan?		
Did you participate in an HSA? If yes, provide Forms 1099-SA and Form 5498-SA		
Do you have a student loan? If yes, attach Form 1098-E		
Did you incur expenses as an elementary or secondary educator?		
Did you contribute <u>cash</u> to a charitable organization of \$300 or less for 2020? Please provide details		
Did you install any energy efficient products to your home such as insulation, exterior doors, energy efficient AC unit, etc.?		
Itemized Deductions	Yes	No
Have you provided all medical & dental expenses?		
Did you purchase a car , boat or other large items, including home improvements?		
Did you purchase a house or rental property?		
Did you refinance any existing loans on your home or other real estate you own? If yes, provide the provide the settlement sheet (Closing Disclosure)		
Have you included your mortgage interest statement?		
Did you pay real estate taxes?		
Did you donate to charity (monetary and/or non-monetary)?		
Other	Yes	No
Have you paid estimated taxes? If yes please provide supporting documents including dates and amounts paid.		
If you have a refund would you like it applied to next year's estimated taxes?		
If you receive a refund, would you like that directly deposited to your bank account?		
If you will owe additional taxes, would you like them directly debited from your bank account?		
Please provide a copy of a cancelled check for direct deposit or direct debit.		
Did you purchase a plug-in electric vehicle during 2020? If yes, please provide the purchase invoice.		
At any time during 2020 did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?		
Do you have a foreign bank account, foreign investments or a foreign trust?		
Do you have a signature authority with a foreign bank account?		

Other Notes: