2020

Tax Questionnaire

REQUIRED - Complete, sign, and return.

Please complete this brief tax questionnaire and return to us along with your Tax Forms and all related documents. Upload safe and securely to your portal account. (http://macnealllc.securefilepro.com/)

If you have not previously filed taxes with Mac Neal LLC and do not have a portal account, on our website click 'Become a Client'. A portal account will be generated for you within 24 hours and an email with instructions on our process will follow.

MacNeal LLC
taxing + consulting

Tax Return Questionnaire for Tax Year 2020

MacNeal LLC
taxing + consulting

For more information, access our website at:
www.MacNealLLC.com

Phone: 313-717-8874
Fax: 312-262-1062
malcolm@macneallc.com

Check box if you are a new client ☐
Referred by: ______________________

Mailing address
☐ Same as Laster year

☐ **Direct Deposit** Check If you want faster and more secure refund sent to your account.
☐ Check if you want your Tax Return Fee deducted from you refund if directly deposited.

Routing #____
Account #____
Type of Account (ex. Checking or Savings) _______________

Taxpayer

Name

Social Security No.____-____-_________Date of Birth_/_/ Occupation

____

Home # (___)_____-_________ Work # (___)_____-_________

Cell # (___)_____-_________

E-Mail ____

Attach & Upload a copy of your Driver's License or ID and your Social Security Card

Spouse

Name

Social Security No._____-_____-_________Date of Birth_/_/ Occupation

____

Home # (___)_____-_________ Work # (___)_____-_________

Cell # (___)_____-_________

E-Mail ____

Attach & Upload a copy of your spouse Driver's License or ID and your Social Security Card

School District

County

Filing Status as of 12/31

☐ **Single**
☐ **Married**
☐ **Married filing Jointly**
☐ **Head of House Hold**
☐ **Qualifying Widow(er) with Dependent Child**

If divorced or legally separated enter date
Provide copy of Decree

Date of Death if Deceased: Taxpayer Spouse

Dependents **(attach & Upload a copy of all dependent(s) social security card(s))**

Check if New	Name	Social Security #	Date of Birth	Relationship Daughter, Son, Mother, Etc.	During the previous yr., No. of months in taxpayer's home	Dependent had income over $3800? Yes/No	Tax Payer provided more than ½ support	Attends College? Yes or No

2020 Tax Questionnaire

Yes* **No** *If Yes to any questions, please provide us with any related tax forms and more details on the last page.

Personal Information

☐ ☐ Did your marital status change during the year?

☐ ☐ Did your address change during the year?

Dependents

☐ ☐ Could you be claimed as a dependent on another person's tax return?

☐ ☐ Were there any changes in dependents?

☐ ☐ Did any of your dependents have unearned income over $1,100 or earned income over $12,400? If yes, the dependent is required to file a return.

☐ ☐ Do you want us to prepare a tax return for your dependent if required?

☐ ☐ Did you or your spouse pay for childcare while you or your spouse worked or looked for work?

CARES Act

economic impact payment = stimulus check/deposit

☐ ☐ Did you or your spouse receive an economic impact payment ? If so, please enter amount received ____.

☐ ☐ Did you receive funds from the Paycheck Protection Program (PPP)? If so, please enter amount received ____.

☐ ☐ Did you receive an Economic Injury Disaster Loan (EIDL)? If so, please enter amount received ____.

☐ ☐ If you use the standard deduction, did you make at least $300 in cash donations in 2020 to qualified charities? Did

☐ ☐ you receive a coronavirus-related distribution from a retirement plan? If so, include all **Forms 1099-R.**

☐ Did you receive your second stimulus check/deposit? If so, how much did you receive?

Healthcare

☐ ☐ Did you obtain healthcare coverage through the Marketplace? If Yes, include all **Form 1095-A.**

☐ ☐ Did you have any transactions pertaining to a health savings account (HSA) or medical savings account (MSA)? If so, include all **Forms 1099-SA and/or 5498-SA**.

Retirement

☐ ☐ Did you receive a distribution from or contribute to a retirement plan (401(k), IRA, etc.)? If so, include all **Forms 5498 and/or 1099-R**.

☐ ☐ Did you transfer or rollover any amount from one retirement plan to another?

☐ ☐ Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?

☐ ☐ Did you withdraw any amounts from your IRA to pay for higher education expenses or acquire a principal residence? If so, provide us details.

Education

☐ ☐ Did you withdraw funds from a Coverdell Education Savings account or Qualified Education Program (Section 529) and use the funds for anything **other than** qualified education expenses? Please include **Form 1099-Q**.

☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If so, include **Form 1098-T**.

☐ ☐ Did you pay any student loan interest? If so, include **Form 1098-E**.

Investments

☐ ☐ Did you or your spouse sell any securities or investment property not reported on Form 1099-B?

☐ ☐ Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please include settlement statement you received at closing.

☐ ☐ Did you or your spouse start, purchase, or sell a business, rental property, or farm, or acquire/sell any interest in any partnership or S corporation?

Yes*	No	*If Yes to any questions, please provide us with any related tax forms and more details on the last page.
☐	☐	Did you or your spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?

Deductions and Credits

☐	☐	Did you purchase any motor vehicles or boats in 2020? If so, provide sales tax paid.
☐	☐	Did you make a qualified residential energy-efficient improvements or purchases involving solar, wind, geothermal, or fuel cell energy resources? If so, provide us with invoices you paid in 2020 along with the tax credit certificate received.
☐	☐	Did you or your spouse contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization? If yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of $10,000 or less.

Miscellaneous

☐	☐	Did you receive any disability income? If so, provide us with any forms you received, 1099's, etc.
☐	☐	Did you pay an excess of $1,000 in any quarter or $2,200 during the year for domestic services performed in or around your home to individuals who could be considered household employees?
☐	☐	Did you have any interest in or a signature authority over a bank account, securities account, or other financial account in a foreign country?
☐	☐	Was your home rented out for more than 14 days or used as a home office?
☐	☐	Did you have total mortgages incurred on or before December 15, 2017 on your first and/or second residence greater than $1,000,000? Do you have total mortgages incurred after December 15, 2017 on your first and/or second residence greater than $750,000?
☐	☐	Did you use funds from a Home Equity Line of Credit (HELOC) for anything **other than** to purchase, build, or substantially improve your residence?
☐	☐	Did you make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value more than $15,000 to any individual?
☐	☐	Do you expect any changes (income, deductions, dependents, etc.) to occur in 2021? If so, please provide details.
☐	☐	Were you notified or audited by either the IRS or a State taxing agency? Please provide us details.
☐	☐	May the IRS discuss your tax return with your preparer?
☐	☐	A PDF Client Copy of your return and e-file release form (or Filing Copy) will be placed in your Client Axcess Portal for your retrieval. Would you like a paper copy of your completed tax return?

Tax Form Reference Guide

Please send us all tax forms you receive. Send us your original paper forms. Upload electronic forms to your Portal.

Income/Deduction	Tax Form
Wages	Form W-2
Interest and Dividends	Form 1099-INT and 1099-DIV
Sale of Stocks, Securities, Capital Assets	Form 1099-B
Miscellaneous Income	Form 1099-MISC and 1099-NEC
Retirement/Pension Distributions	Form 1099-R
Pass-thru Income (LLC's, S Corp., Partnership, Trust, Estate)	Schedule K-1
Unemployment Compensation	Form 1099-G
Social Security Income	Form SSA-1099
Mortgage Interest	Form 1098
Health Savings Account (HSA or MSA)	Forms 1099-SA and 5498-SA
Healthcare Coverage or Insurance	Forms 1095-A
Student Loan Interest	Form 1098-E
Tuition	Form 1098-T

Additional Information (also provide any details related to “Yes” answer from above)

Return this Tax Questionnaire and Paper Tax Forms no later than March 15, 2021.

I have submitted this information for the sole purpose of preparing my tax return(s). This information is true, correct, and complete to the best of my knowledge. I agree to the terms of the 2020 Tax Return Engagement Letter on file in my Client Portal if I 1) sign this tax questionnaire, 2) send 2020 tax data to prepare my 2020 tax return(s), or 3) authorize BSH to electronically submit my tax return to taxing authorities.

Client Signature

Date

Co-Client Signature

Date

If we have questions regarding your tax information, how would you like us to contact you? ☐ Email ☐ Text ☐ Phone

MacNeal LLC