

**DAVID C. BRYANT, CPA - INDIVIDUAL INTERVIEW
2020 INCOME TAX RETURN**

Name: _____ Phone#: _____ Email: _____

Yes	No	Question / Response
_____	_____	Did you receive a 6 Digit Pin# from the IRS? (Identity theft) <i>If so, please provide</i> <input type="text"/>
_____	_____	Did you receive an Economic Stimulus Payment (Notice 1444)- <i>If YES, how much?</i> <input type="text"/>
_____	_____	Did you receive any Unemployment Benefits in 2020? <i>If YES, please provide a 1099-G.</i>
_____	_____	Did you make a charitable donation of \$300 or more? <i>If YES, please provide (even if not itemizing)</i>
_____	_____	Were you insured through the Health Insurance Marketplace at any time in 2019? <i>Provide 1095A.</i>
_____	_____	Did you make any estimated tax payments? <i>Need dates, amounts, & to whom.</i>
_____	_____	Did you gift anyone \$15,000 or more in dollars or property? <i>Additional gift tax return needed</i>
_____	_____	Was there a change in your dependents? <i>Additional child/parent on return, taking child off.</i>
_____	_____	Do you have a child, age 17-23, whom is a student and had lived with you for over half the year (whether away at college or not)? OR a non-child relative that you supported?
_____	_____	Did you pay child care costs for a dependent child under age 13 so you could work?
_____	_____	Did you or your child go to college full time (6 credits) for at least one semester?
_____	_____	What year of college? <u>Circle</u> <i>Freshman, Sophomore, Junior, Senior</i>
_____	_____	Did you take a distribution from a 529 plan to pay for your child's tuition for Grades K-12? <i>If so please provide the student's name and amount paid in tuition.</i>
_____	_____	Did you pay or receive alimony?
_____	_____	Did you purchase/sell/refinance a house? <i>We will need the Closing Disclosure Settlement</i>
_____	_____	If you have a home equity loan or line of credit, was it used to buy or improve a 1 st or 2 nd residence? If not, what was it used for (consolidate debt, buy boat or car, etc)?
_____	_____	Have you had any debts cancelled or reduced? <i>We will need a 1099-C.</i>
_____	_____	 Was it part of a bankruptcy? <i>We will need the bankruptcy documents.</i>
_____	_____	Did you contribute to an IRA, other than through your employer? <u>Circle</u> <i>Traditional or Roth</i>
_____	_____	Did you take a distribution from an IRA or 401K or 403B? <u>Circle</u> How many Accounts?
_____	_____	 Was any part of this distribution paid directly to a charity?
_____	_____	Did you buy or sell stock?
_____	_____	Did you buy or sell company stock in 2019 from an employer that you work or worked for?
_____	_____	Did you contribute to/receive distributions from your HSA (Health Savings Account)? <i>Not flex spending.</i>
_____	_____	Do you pay for long term health care? <i>Not health insurance-Only long term care</i>
_____	_____	Are you an active member of an Armed Forces or Reservist?
_____	_____	Did you receive a military pension?
_____	_____	Do you have a financial interest in or signature authority over, any foreign financial accounts?
_____	_____	Did you buy, sell, receive or send cryptocurrency in 2019? <i>If so, please provide us with more information regarding the transactions.</i>
_____	_____	Do you own a rental property? <i>If YES, how many hours worked at each property?</i> <input type="text"/>

_____ If you receive a refund would you like it to be direct deposited?

_____ If you owe money would you like it to be directly withdrawn?

 IF YES TO EITHER PLEASE CONFIRM LAST 4 DIGITS OF BANK ACCOUNT#

Additional Items/Notes we may need to be aware of-Please fill out on back 

By signing below you verify that all data given to David C. Bryant, CPA may be used in preparation of your 2020 Individual Income Tax Returns.

Signature of Interviewee _____

Date of Interview _____