

CLIENT CHECKLIST

OFFICE USE ONLY:

DROP OFF DATE: ____/____/____

REC'D BY: _____

NAME(S) _____ BEST PHONE NUMBER TO CALL _____

BEST EMAIL CONTACT: _____ @ _____ . _____

1. MARITAL STATUS: SINGLE MARRIED/JOINT MARRIED/SEPARATE WIDOWED

2. HOW MANY DEPENDENTS ARE YOU CLAIMING? _____ HOW MANY DEPENDENTS LIVE WITH YOU? _____
(IF THEY DO NOT LIVE WITH YOU THEN YOU NEED FORM 8332, FROM CUSTODIAL PARENT)

3. FORMS INCLUDED: # OF W2's _____ # OF 1099R's _____ # OF 1099MISC's _____ # OF 1099NEC's _____

4. DO YOU HAVE ANY OTHER INCOME FROM ANY OTHER SOURCE? (check all & enclose any forms) YES NO
___ INTEREST/DIVIDENDS ___ UNEMPLOYMENT COMP ___ SOCIAL SECURITY
___ WELFARE/AFDC ___ WORKMAN'S COMP ___ GAMBLING/LOTTERY
___ JURY DUTY ___ ALIMONY: DIVORCE DATE: ____/____/____
___ HAVE YOU INCURRED INCOME AND EXPENSES ASSOCIATED WITH GIG ECONOMY (LYFT, UBER, AIRBNB, SHIPT, ETC.)
___ HAVE YOU SOLD OR EXCHANGED ANY VIRTUAL/CRYPTO CURRENCY (BITCOIN, LIBRA, ETC.)
___ OTHER (SPECIFY) _____

5. DID YOU RECEIVE FRONTLINE WORKER PAY (HERO PAY) FOR \$487.45? TAXPAYER: _____ SPOUSE: _____

6. DO YOU PAY FOR CHILD CARE AND IS THE INFO INCLUDED? YES NO

7. DO YOU HAVE EDUCATION EXPENSES? (MUST SPECIFY GRADE BELOW) YES NO
___ K - 12 ___ COLLEGE (1098-T REQUIRED) ___ CONTINUING EDUCATION

8. DID YOU BUY, SELL OR REFINANCE YOUR HOME THIS YEAR? YES NO
ARE THE SETTLEMENT PAPERS INCLUDED? YES NO
IF REFINANCE: HOW MANY YEARS DID YOU REFINANCE FOR? _____

9. DO YOU HAVE QUALIFIED CHARITABLE DONATIONS (QCD) FROM RETIREMENTS? YES NO
(PLEASE INCLUDE RECEIPTS AND DOLLAR AMOUNTS)

10. DO YOU MAKE STUDENT LOAN PAYMENTS? YES NO
FORM 1098-E INCLUDED? (REPORTS FEDERAL INTEREST ONLY) YES NO
NEED TOTAL AMOUNT OF PAYMENTS MADE DURING YEAR: \$ _____
ORIGINAL AMOUNT BORROWED \$ _____

11. IF YOUR HEALTH INSURANCE IS THROUGH MNSURE-IS FORM 1095A ENCLOSED? *REQUIRED* YES NO

12. DO YOU OR YOUR SPOUSE CONTRIBUTE TO A TRADITIONAL IRA? YES NO

13. DO WE HAVE CORRECT DIRECT DEPOSIT INFORMATION ON FILE? (BANK NAMES CHANGE!) YES NO
IF NO, PLEASE INCLUDE A VOIDED CHECK OR LETTER FROM YOUR BANK W/ ROUTING AND ACCOUNT NUMBERS.

14. MN LAW NOW REQUIRES WE ASK, "DO YOU WANT TO DONATE TO THE WILDLIFE FUND"? YES NO
If yes, list amount \$ _____ (This will decrease your MN refund or Increase your Balance Due)

**** PLEASE FILL OUT GRAY FOLDER ALSO ****

QUESTIONS/NOTES: (use back if necessary) _____

