

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/NFTs (BITCOIN, LIBRA, ETC.)
___ OTHER (SPECIFY) _____

5. 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) DIRECT 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. DID YOU RECEIVE THE MN DIRECT TAX REBATE PAYMENT (STIMULUS)? *MN LETTER REQ'D* YES NO

14. DID YOU MAKE ANY ENERGY EFFICIENT IMPROVEMENTS TO YOUR HOME? YES NO
(Windows, Doors, Insulation, Solar, Home Energy Audits and more...)
(RECEIPTS & MANUFACTURER CERTIFICATES REQUIRED TO SUBSTANTIATE)

15. 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.

16. 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) _____

