

2020 Additional Tax Info Questionnaire

YEAR-END PAY STUB

N/A YES NO
☐ ☐ ☐

Have you included your last pay stub (12/31/20) for each job held in 2020?
Please include the final pay stub with your tax documentation.

COVID-RELATED QUESTIONS

If you took a COVID-related pension distribution:

N/A YES NO
☐ ☐ ☐

Do you wish to spread the income from the distribution over 3 years (2020, 2021, 2022)?

N/A YES NO
☐ ☐ ☐

If no, do you wish to include all distribution income on your 2020 return?

N/A YES NO
☐ ☐ ☐

Do you plan on re-contributing any of this distribution before 12/31/2022?

N/A YES NO
☐ ☐ ☐

Did the Taxpayer or Spouse receive any Federal or State Unemployment benefits due to COVID?

N/A YES NO
☐ ☐ ☐

If yes, did you provide a copy of Form 1099-G. (You may need to log onto your State Unemployment account to download this tax form.)

N/A YES NO
☐ ☐ ☐

If self-employed, was the Taxpayer or Spouse unable to work due to actually being diagnosed with COVID?

N/A YES NO
☐ ☐ ☐

If self-employed, was the Taxpayer/Spouse unable to work due to caring for a family member diagnosed with COVID?

N/A YES NO
☐ ☐ ☐

If self-employed, was the Taxpayer/Spouse unable to work due to caring for child not able to go to school/daycare?

PAYCHECK PROTECTION PROGRAM (PPP) LOANS

| N/A | YES | NO |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Did you apply for a PPP Loan?

| N/A | YES | NO |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Were you approved?

Date? _____

How much? _____

| N/A | YES | NO |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Have you applied for forgiveness of the loan?

| N/A | YES | NO |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Was the forgiveness approved?

How much was forgiven? _____

| N/A | YES | NO |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Did you receive any SBA Grants?

List all Grants received and the amount:

| N/A | YES | NO |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Did you receive any SBA COVID Loan?

List all Loans and the amount:

SIGNATURE: _____

DATE: _____