

Community Tax and Financial - 2020 **Returning** Client Data Form

Taxpayer First Name	Last Name	Date of Birth	SSN	
Spouse First Name	Last Name	Date of Birth	SSN	
Mailing Address	Apt. #	City	State	ZIP Code
On 12/31/20 were you? <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married but wish to file Separately				

Dependents

For new Dependents we'll also need Dates of Birth and copies of Social Security Cards & Birth Certificates.

	Name	Date of Birth	Relationship	Total Months Lived in Your Home in 2020
1	_____	_____	_____	_____
2	_____	_____	_____	_____
3	_____	_____	_____	_____

Childcare? Amount \$ _____ No. of Children with care _____

Were you or a dependent enrolled in college in 2020? **Yes No** Student Loan Interest? \$ _____

Household Information

<u>Did you pay Property Taxes in 2020?</u>	Total Paid	\$ _____
<u>Did you pay Rent in 2020?</u>	Monthly Rent	\$ _____ Number of Months Rented _____
<u>Did you receive Unemployment Income in 2020?</u>	Yes No	
Enter the TOTAL amounts received from each round of Economic Stimulus Payments. (These aren't taxable but must be reconciled on your tax return. Round 2 is reported even though received in 2021.)	Round One	\$ _____
	Round Two	\$ _____
<u>Did you receive health insurance through the Marketplace (Obamacare)?</u>	Yes No	
	<i>If yes, you MUST provide Form 1095-A</i>	
<u>Do you have any:</u>	Foreign Bank Accounts Yes No	Virtual Currency (for example, Bitcoin)? Yes No

How Would You Like to Receive any Refunds?

<input type="checkbox"/> CHECK	<input type="checkbox"/> DEPOSIT to MY CHECKING / SAVINGS on FILE	<input type="checkbox"/> DEPOSIT to CHECKING / SAVINGS BELOW
Bank Name _____	RT _____	Account _____

Taxpayer Email Address

Spouse Email Address

Taxpayer Signature

Date

Phone Number