



Thank you for choosing June CPA for your 2020 income tax return preparation. Please take a moment to answer these questions so that we may better serve you.

- 1 Has your address changed?
If yes:
2 Has your email address changed?
If yes:
3 Would you like electronic delivery of your returns to you (Liscio)? Recommended
4 What is the best phone number to reach you?

Questions for Individual Income Tax Returns:

- 1 Did you have any virtual(crypto) currency transactions in 2020?
2 Did you receive Unemployment benefits in 2020?
3 Did you receive the 1st COVID Stimulus rebate payment (Approx. April 2020)?
If yes how much?
4 Did you receive the 2nd COVID Stimulus rebate payment (Jan. 2021)?
If yes how much?
5 Did you receive a Small Business Administration PPP loan in 2020?
If yes, how much was it?
If yes, was it forgiven in 2020?
6 Do you have any foreign financial accounts (including "signatory authority")?
If yes, were total balances over \$10,000 (in U.S. dollars) anytime in 2020?
7 If filing Schedule C or E, were 1099's filed for subcontractors?
8 Provide total insurance premiums paid for primary residence in 2020:
(Include total of homeowner's, flood, fire):
9 Did you pay all of your IRS and state 2020 quarterly tax payments (if applicable)?
10 If refund, would you like direct deposit?
11 If balance due, would you like direct debit?
12 If 2021 estimates are needed, would you like direct debit?
(if 10, 11 or 12 are yes, please provide copy of voided check):

Questions for Business Income Tax Returns:

- 1 Did you receive a Small Business Administration PPP loan in 2020?
If yes, how much was it?
If yes, was it forgiven in 2020?
2 Did you pay any subcontractors \$600 or more in 2020?
If so, did you issue them a 2020 Form 1099?
3 How many W-2s did you issue for 2020?

Comments:

Four horizontal lines for writing comments.

Date:

Name: