Dear Client,

First and most importantly, we hope you and your family are all doing well. The past year has been a stressful time for everyone. Our goal is to find ways to make your tax preparation process as safe and stress free as possible. Should you have any special concerns, please do not hesitate to contact us.

The following pages are your newly formated electronic organizer. Please fill in the questions to the best of your ability as this document is required to be completed for our services. Towards the end of this organizer is a checklist to help you identify the forms and information that we will need based on the boxes that you check.

We will be accepting returns beginning February 1st with the final due date for providing us your tax information being Thursday, March 25th. This will allow us the time to ensure that all returns receive an appropriate amount of attention before completion.

There are many federal tax law changes that were made during 2020 with the most recent changes being signed into law on December 27. Minnesota has conformed to some but not all of the federal changes and it is possible that the state may pass additional changes that impact your 2020 tax reporting. With the late timing of the changes, and the related final tax forms approval, the start date for e-filing returns may be delayed. But we will be ready to go when the e-filing system becomes active. Due to this year's new complexities, we are encouraging all clients to provide your tax package as soon as you can.

We will have limited days and times available for tax appointments which will take place in a virtual setting either by video or phone meeting. If you are a new client to us, your tax situation has changed significantly, or you have experienced any unusual 2020 tax activity, please be sure to contact us to setup a time to talk. Otherwise, we request that you deliver your information to us without an appointment.

Available methods for delivering your tax information will be to use the upload feature in Onvio Client Center, mailing dropping them off at our office. We now have a drop slot accessible from outside our office that can be used for secure personal delivery of your tax information. Whatever method you choose, please remember to include your signed engagement letter and completed questionnaire with your tax documents. These documents can now be e-signed from within your new online account. We will have extras available outside our door if needed, but we encourage you to e-sign them or complete them in the safety of your own home before arriving.

We will focus our attention on reaching out to you during the preparation process. By having our conversations with you during this time, it will help us give you more accurate answers to questions and allow us to bring up important topics identified during the preparation of your returns.

There is a note page included at the end of this organizer for your questions and concerns. We will contact you during processing to go over any items that you list on this page. You may also call or email with questions that come up after you have delivered your tax information to us. We will respond as soon as we are able. We would be happy to schedule a phone or video consultation/pick-up appointment to go over any final questions and to advise you on changes that you may want to make for the coming year. As always, we are also available throughout the year for tax-planning advice.

If you have any questions or concerns on these topics, please feel free to contact our office. We appreciate the opportunity to assist you with your tax and financial needs and look forward to working with you this year.

Sincerely,

Stenseth Samuelson & Boese, Ltd.

Taxpayer

Name:
Date of Birth:
Social Security Number:
Occupation:
Marital Status: Single ☐ Married ☐ Separated ☐ Divorced in 2020 ☐

Spouse

Name:
Date of Birth:
Social Security Number:
Occupation:

Contact Information

Address:
Spouse Address (if different):
Taxpayer Email:
Spouse Email:
Home Phone:
Taxpayer cell: Work phone:
Spouse cell: Work phone:

Dependent Information

Name:
Date of Birth:
Social Security Number:
Relationship:

Name:
Date of Birth:
Social Security Number:
Relationship:

Name:
Date of Birth:
Social Security Number:
Relationship:

Name:
Date of Birth:
Social Security Number:
Relationship:

Tax Return Delivery Information

How would you like to receive your tax return? You may choose both options.

- ☐ Electronic version delivered via my Onvio Client Center account
- ☐ Paper version (choose an option below)
  - ☐ Delivered via US Postal Service
  - ☐ Picked up at the office by appointment

If your return is mailed to you, are there any specific instructions we will need? (Dates you will be gone, address details, alternate shipping locations…?) Please list them below.

____

____

Y N Bank Information

☐ ☐ Would you like direct deposit set up for any tax refunds?

You will need to e-sign the bank verification to approve the account we have on file. If we do not have your bank information, please upload a void check or enter the information below.

Bank name: ____

Routing number: ____

Account number: ____

☐ I will upload a void check

You may also choose to have amounts for taxes due automatically withdrawn from your account on April 15th.

☐ ☐ Would you like to have direct withdrawal set up for any amounts due to the state or federal taxing agencies?

Y N Contact Information

☐ ☐ Has your address changed since last year?

If yes, what is your new address?

____

If we have questions during preparation, who should we contact? _______________________

What method of contact is best? Choose One

Email: _______________________________________

Phone: _______________________________________

Y N Personal Information

☐ ☐ Did your marital status change during 2020? If yes, please explain:

N/A ____

☐ ☐ ☐ If you are divorced, were there any changes made to your divorce decree in 2020 regarding alimony or dependents?

☐ ☐ Can you be claimed as a dependent by another taxpayer?

Y N Dependent Information

☐ ☐ Do you have any dependents? If no, **click here** to move to the next section.

☐ ☐ Were there any changes in dependents from the prior year? If yes, please explain:

____

☐ ☐ Are you adding a new dependent for 2020? If yes, please upload a copy of their social security card.

☐ ☐ Did you pay any expenses related to the adoption of a child during the year?

☐ ☐ Did you provide over half the support for any person other than your dependent children or spouse during the year? If yes, please explain:

____

Please list the names and grades (if applicable) of all dependent children who were under the age of 24 at the end of 2020 and that you will be claiming on your tax return.

____

____

____

____

☐ ☐ Did all of the children listed reside with you for all of 2020? (Students living elsewhere for the sole purpose of attending higher education are still considered to reside with you.)

If any were living elsewhere, please explain:

____

In order to qualify for a child tax credit, you need to provide documentation verifying that each child you are claiming resided with you in 2020. This documentation needs to be from an official source, have your child's name and address listed, and be dated 2020.

Examples of some documents that would qualify are:

1. Records or documents from your child's school, healthcare or childcare provider, or financial institution (report cards are popular options).
2. Signed statements on official letterhead from your child's healthcare provider, place of worship, employer or school.

Y N

☐ ☐ Have you had any earned income credits or child tax credits disallowed or reduced in previous years?

N/A

☐ ☐ ☐ If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?

N/A

☐ ☐ ☐ If divorced, are you the custodial parent(s) of all the children listed? For tax purposes, the custodial parent is the parent with whom the child stayed for the greater number of **nights** during the year (excluding nights away at school).

If no, please provide a signed form 8332 from the custodial parent for each child you will claim on your return.

N/A

☐ ☐ ☐ If you are divorced, have you released your claim to exemption (with form 8332) for any of the children listed?

☐ ☐ Did you pay for childcare while you worked, looked for work, or while you were a full-time student? (Childcare can be for children up to the age of 13, or for children who are incapable of caring for themselves due to disability. It can also include day-camp, after school care, and similar activities, but not overnight camp.)

If yes, please upload documents showing the following:

1. The amounts paid per dependent
2. The name and address of the provider
3. The SSN (if an individual) or the EIN (if a business or organization) for the provider.

☐ ☐ Did any of your dependents have income from investment accounts, IRA distributions, or other "unearned" income sources in excess of $2,200? (Do not include wages or Social Security income when determining your child's "unearned" income.)

☐ ☐ Do any of your dependents need to file tax returns?

☐ ☐ Have any of your dependents filed their own tax returns for 2020 and claimed themselves?

Y N College and Post-Secondary Education Information

If you didn't have any expenses related to college or other post-secondary education (including student loan interest) or make contributions or withdrawals from any 529 accounts **click here** to go to the next section.

☐ ☐ Did you pay student loan interest in 2020?

☐ ☐ Did you live in Minnesota and make student loan payments in 2020?
If yes, please provide the following so we can check your eligibility for a MN credit.

1. Amount paid towards your loans in 2020
2. The total amount of qualified loans you borrowed
3. Amount of interest paid in 2020.

☐ ☐ Did you or your dependents attend a post-secondary school during the year? Or plan to attend one in 2021?

☐ ☐ Did you have any Post-secondary education expenses during the year on behalf of yourself or a dependent?
If yes, please provide both:

1. **Form 1098-T** from the institution
2. Documentation showing payments made in 2020, such as cancelled checks or receipts from the institution.

If you had education expenses in 2020, please answer the following three questions to help us determine your eligibility for certain education credits:

☐ ☐ a. Have any of the post-secondary students been convicted of a felony drug offense?

☐ ☐ b. Have any of the post-secondary students already completed 4 years of post-secondary education?

☐ ☐ c. Have any education credits been disallowed or reduced in prior years?

If yes to any, please explain:

____

Y N

N/A ☐ ☐ Did anyone in your family receive a scholarship of any kind during the year?
☐ ☐ ☐ If yes, were any of the funds used for expenses other than tuition, such as room and board?

☐ ☐ Did you cash any Series EE or I US Savings bonds issued after 1989?

☐ ☐ Did you make any contributions to an education savings or state sponsored 529 Plan account?
If yes, please provide:

1. The Company name and the account number for the plan
2. The amount contributed in 2020
3. The beneficiary name and social security number
4. The name of the account owner

☐ ☐ Did you take any distributions from an education savings or 529 Plan account?
If yes, please provide:

1. The 1099-Q for the distribution (which you should receive from the company holding the account.
2. Details on what the distribution was used for (College or K-12, and for whom).
3. If used for college, please provide an itemized receipt from the school showing a breakdown of charges and payments made with dates (this is usually available to the student online or from the billing office).
4. Provide documentation for any of the following expenses not listed on the school bill:
   a. Textbooks, supplies and equipment required by the school
   b. Off-campus housing expenses (deductible up to what it would cost to live on-campus, so please also provide an estimate of on-campus housing costs)
   c. Internet access
   d. The purchase of a computer, computer equipment or software for educational purposes

Y N Home Ownership Information

If you did not own any real estate in 2020, **click here** to go to the next section.

☐ ☐ Did you purchase or sell a principal residence during the year?

☐ ☐ Did you purchase or sell a secondary home or other non-business property?

If you purchased or sold any property, please provide the closing statement from the purchase/sale. (We just need the pages with the borrow/seller financial transaction summary.)

☐ ☐ Did you foreclose or abandon a principal residence or other real property during the year?

☐ ☐ Did you take out a home equity loan this year?
If yes, what was it used for?

____

☐ ☐ Did you take out a new mortgage this year?

N/A
☐ ☐ ☐ Is the loan secured by the same property that was purchased or improved? (For example, if you took out a loan secured by the value of home A, were all the proceeds used to purchase or improve home A?)

N/A
☐ ☐ ☐ Were all proceeds used to purchase or improve your main home?
If no, how much was used for other things?

____

☐ ☐ Did you refinance a principal residence or second home this year?

N/A
☐ ☐ ☐ Did the refinance extend the repayment time of the loan?

☐ ☐ ☐ Were all the funds from the refinance used to satisfy the original loan?

If no, how much was borrowed above the outstanding loan amount, and what were the excess funds used for?

____

☐ ☐ Did you pay real estate taxes for your primary home and/or second home?

☐ ☐ Did you pay any mortgage interest on an existing home loan?

☐ ☐ Did you pay mortgage insurance premiums in 2020?

☐ ☐ Did you make energy efficient improvements to your main home this year?

Y N Business and Rental Transactions

☐ ☐ Did you have any rental or business activity in 2020? If no, **click here** to go to the next section.

☐ ☐ Do you have interest (ownership) in a partnership, LLC or S corporation?

☐ ☐ Did you acquire a new or additional interest in a partnership or S corporation?

☐ ☐ Did you sell, exchange, or purchase any assets used in your trade or business?

☐ ☐ Did you start a new business during the year?

☐ ☐ Did you purchase or sell a business during the year?

☐ ☐ Did you purchase or sell rental property during the year?
If yes, please provide the closing statement.

☐ ☐ Did you utilize an area of your home for business purposes?

☐ ☐ Do you use a vehicle for your business?

N/A

☐ ☐ ☐ If yes, do you keep a mileage log? (You must provide one to take a mileage deduction.)

☐ ☐ As a business owner, did you pay health insurance premiums for you and your family or your employees?

☐ ☐ Have you provided us with documentation for all business income you received in 2020, including barter, crypto-currency, consumer-to-consumer activity, cash based revenues and all other income received in-person, in-kind or electronically?

Y N Health Care Information

☐ ☐ Did everyone in your family have health care coverage for 2020?

☐ ☐ Did you pay out-of-pocket medical expenses totaling more than 7.5% of your income?
If yes, or if you think you may have gotten close, please provide the totals paid.

☐ ☐ Did you pay long-term care premiums (nursing home insurance) for yourself or your family?

☐ ☐ Did you enroll for health insurance through the MNsure or Healthcare.gov exchages?
If yes, did you:

- ☐ Enroll with a non-family member
- ☐ Enroll in lower-cost coverage through the ACA
- ☐ Receive Health Coverage Tax Credit advance payments

☐ ☐ Did you make any contributions to a health savings account (HSA) or Archer MSA?

☐ ☐ Did you receive any distributions from an HSA, Archer MSA, or Medicare Advantage MSA this year?

N/A

☐ ☐ ☐ If yes, were all distributions used for qualifying medical expenses?

Y N COVID-19 Information

☐ ☐ Did you receive an Economic Impact Payment (EIP)?
If yes, how much did you receive?

1st round of payments (Spring/Summer):

2nd round of payments (December/January):

If you have IRS notices 1444 or 1444b detailing your payments, please upload them with your documents.

☐ ☐ Did you receive a Paycheck Protection Program (PPP) loan?
☐ ☐ If yes, did you apply for PPP loan forgiveness?

☐ ☐ Are you a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state?

☐ ☐ Did you receive emergency leave sick pay?

☐ ☐ Did you receive emergency family leave wages?

☐ ☐ Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year?

If you are self-employed, were you unable to perform your self-employed activities due to:

☐ Coronavirus related care you needed?
☐ Coronavirus related care you provided to our son or daughter under the age of 18?
☐ Coronavirus related care you provided to another?

Y N Foreign Information

☐ ☐ Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or foreign employers?

☐ ☐ Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?

☐ ☐ Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, outside the U.S.?

☐ ☐ Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity (not held in your US brokerage account).

☐ ☐ Do you own stock in a foreign corporation and have signature authority on their bank accounts?

Y N Income Information

☐☐ Do you or your spouse work jobs where you are considered employees?

☐☐ Did you change jobs or retire this year?
If yes, please describe:

____

☐☐ Do you expect a large fluctuation in income, deductions or withholding next year?

☐☐ Do you want a tax projection for 2021? Additional fees apply.

☐☐ Did you acquire or dispose of any stock during the year?

☐☐ Do you have investment accounts or own stock that pay you interest or dividends?

☐☐ Did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual currency (including from an airdrop or hard fork?)

☐☐ Did any of your life insurance policies mature, or did you surrender any policies?

Y N Did you have any of these sources of income in 2020?:

☐☐ Unemployment benefits
☐☐ Disability benefits
☐☐ Medicaid waiver payments as difficulty of care
☐☐ Income from property sold in a prior year
☐☐ Awards, prizes, gabling or lottery winnings?
☐☐ Hobby income
☐☐ Nonemployee compensation

Y N Contribution Information

☐☐ Did you make any charitable contributions in 2020? If no, **click here** to go to the next section.

Please provide contribution information even if you do not expect to itemize. There is now a special deduction for up to $300 in cash donations whether or not you itemize.

☐☐ Did you make any cash or noncash contributions in 2020?
If yes, you will need to have records documenting the donations.

☐☐ Did you donate a gift of more than $250 to any charities?
If yes, you will need to provide written acknowledgement from the organization.

☐☐ Was the total value of your noncash contributions over $500?
If yes, we will need information listing the donations by date and including the donee name, a description of the items donated, and the value of the donation.

☐☐ Did you donate a vehicle or boat during the year?
If yes, we will need form 1098-C or other written acknowledgement from the donee organization.

Y N Retirement Information

☐ ☐ Are you an active participant in a pension or retirement plan?

☐ ☐ Did you receive any Social Security benefits during the year?

☐ ☐ Did you receive income from a pension in 2020?

☐ ☐ Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

N/A

☐ ☐ ☐ If yes, were any withdrawals due to a Federally declared disaster or COVID-19?

☐ ☐ Did you make any contributions to an IRA or Roth IRA account?

☐ ☐ Did you make any contributions to a Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan?

☐ ☐ Did you repay any qualified disaster retirement plan distributions in 2020?

☐ ☐ Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?

☐ ☐ Do you have balances in any retirement accounts?
If yes, what types of accounts are held?

____

☐ ☐ Are you a retired public safety officer?

Y N Government Information

☐ ☐ Did you or a dependent receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft?
If yes, please provide the IRS letter.

☐ ☐ Did you receive correspondence from the State or the IRS?
If yes, please explain:

____

☐ ☐ Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?

Do you or your spouse want to designate $3 to the Presidential election Campaign fund?
If you check yes, it will not change your tax or reduce your refund.

☐ ☐ Taxpayer
☐ ☐ Spouse

Y N Miscellaneous information

- ☐☐ Did you incur interest expenses associated with any investment account you held?
- ☐☐ Did you make any major purchases during the year (cars, boats, etc.)?
- ☐☐ Did you make gifts of more than $15,000 to any individual?
- ☐☐ Did you engage in any bartering transactions?
- ☐☐ Did you pay any individual as a household employee during the year?
- ☐☐ Did you incur a casualty loss in a Federally declared disaster area?
- ☐☐ Did you have any debts cancelled, or forgiven this year, such as a home mortgage, credit card, or student loan(s)?
- ☐☐ Did you lend money with the understanding of repayment and this year it became totally uncollectable?
- ☐☐ Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle?
- ☐☐ Did you reside in or operate a business in a federally declared disaster area? These areas include victims of hurricanes, tropical storms, floods, as well as wildfires.
- ☐☐ Did you incur moving costs because of a permanent change of station as a member of the armed forces on active duty?
- ☐☐ Did you make any contributions or withdrawals form an ABLE account?
- ☐☐ Did you pay Federal or State estimated tax payments? If yes, please provide the amounts and dates of the payments.

1st Quarter Federal Amount:		Date:	
2nd Quarter Federal Amount:		Date:	
3rd Quarter Federal Amount:		Date:	
4th Quarter Federal Amount:		Date:	

1st Quarter Minnesota Amount:		Date:	
2nd Quarter Minnesota Amount:		Date:	
3rd Quarter Minnesota Amount:		Date:	
4th Quarter Minnesota Amount:		Date:	

Y N Minnesota Information

If you do not live or work in MN, **click here** to go to the next section.

☐ ☐ Did you pay K-12 educational expenses for your children?
If yes, see page 18 at the end of the questionnaire for a list of the different expenses that you can claim or a Minnesota credit or subtraction on your tax return.

☐ ☐ Does anyone live with you in your primary residence other than your spouse and dependents?

☐ ☐ Did you make any out-of-state purchases totaling more than $770 on items taxable by MN (by telephone, internet, mail or in person) for which the seller did not collect state sales tax?

☐ ☐ Would you like to donate to the MN Nongame Wildlife fund? This will increase your tax due or decrease your refund.
If yes, how much?

____

☐ ☐ Did you pay vehicle registration tax?
If yes, please provide your registration tabs or the license plate numbers of your vehicles.

Plate numbers: ____

☐ ☐ Did you have a work-related expense account or allowance during the year?

N/A ☐ ☐ Did you use your car for work, other than commuting?
☐ ☐ ☐ If yes, did your employer reimburse you?

☐ ☐ ☐ Do you keep a mileage log? (you must provide one to take a mileage deduction)

☐ ☐ Did you work out of town for part of the year?

☐ ☐ Did you have any expenses related to seeking a new job during the year?

☐ ☐ Did you incur moving costs because of a job change?
If yes, did your employer reimburse you for any or all of those costs?

☐ ☐ Did you have any unreimbursed employee business expenses?

☐ ☐ Did you have any non-federal disaster area casualty or theft losses?

☐ ☐ Did you experience a stillbirth and receive a certificate from MN Dept. of Health?

Please bring your 2021 property tax statement or 2020 CRP for us to check eligibility for MN property tax refund.

Y N Wisconsin Information

☐ ☐ Did you pay private school tuition (K-12) for your dependents?

☐ ☐ Did you, your spouse or dependents attend a college or university in WI or MN in 2020?

☐ ☐ Did you make any out-of-state purchases taxable by WI (by telephone, internet, mail or in person) for which the seller did not collect state sales tax?
If yes, how much:

____

☐ ☐ Did you pay rent for your primary residence in WI?
If yes, how much did you pay in 2020?

____

☐ ☐ Was heat included?

☐ ☐ Did you make a contribution to a WI state-sponsored college savings program (Edvest or Tomorrow's Scholar)?

Use the list below to help you gather your tax information. Your answers to the questions have checked the boxes for some of the most relevant documents for your return.

This list is not all-inclusive, so please also provide any other tax forms you receive and any information that is relevant to any questions for which you answered yes, or that might otherwise have an impact on your income or deductions.

Needed	Provided	
☐	☐	A void check
☐	☐	Social Security card for new dependent.
☐	☐	Address verification for dependent children – **click here** for details.
☐	☐	Divorce decree, if not provided in the past.
☐	☐	Form 8332 for any child you will claim that did not live with you for more than half the nights in the year.
☐	☐	Childcare cost documentation – **click here** for details.
☐	☐	Child's unearned income documents. Usually interest, dividend or brokerage statements. This also includes unemployment benefits.
☐	☐	Form(s) 1098-E showing student loan interest paid.
☐	☐	Student loan payment information – **click here** for details.
☐	☐	Form 1098-T from the institution and documentation showing payments made in 2020, such as canceled checks or receipts form the institution.
☐	☐	Details on scholarships received and how they were used.
☐	☐	Education savings plan contribution documentation – **click here** for details.
☐	☐	Education savings plan withdrawal documentation – **click here** for details.
☐	☐	Closing statement from primary residence purchased or sold in 2020.
☐	☐	Closing statement from other property purchased or sold in 2020.
☐	☐	Settlement statement for new mortgage showing a breakdown of loan terms.
☐	☐	Settlement statement for refinanced loan.
☐	☐	Property tax statements or amounts and dates paid.
☐	☐	Form 1098 for mortgage interest paid.
☐	☐	Details on energy efficient improvements made to your main home.
☐	☐	Details on home office expenses including square footage of the area, square footage of the home, and costs shared by the home and office, like utilities.
☐	☐	Please provide both the total miles driven on the vehicle in 2020, as well as the total miles driven for the business/work activity. If you lease your car or are deducting actual automobile expenses instead of taking a mileage deduction, please also provide: original value of the car (what you could have bought it for) and date of lease, and all expenses for lease payments, gas, car washes, licenses, insurance etc.
☐	☐	All K-1's showing partner's share of income.
☐	☐	All legal documents from the formation of a business during the year.
☐	☐	All legal documents from the sale or purchase of a business during the year.
☐	☐	Closing statement from rental property purchased or sold in 2020.
☐	☐	Details on long term care premiums including the name of the company, the policy number and the amounts paid for each person on the policy.
☐	☐	Form 1095-A for health coverage obtained through MNsure or healthcare.gov.
☐	☐	Form 1095-B or 1095-C showing health care coverage.

- ☐ ☐ Form 1099-H for health coverage tax credit advance payments.
- ☐ ☐ Form 5498-SA or details on health savings account contributions.
- ☐ ☐ Form 1099-SA to show distributions from health savings accounts.
- ☐ ☐ Statements showing cost basis and selling price of stock sold in 2020 (often all of this information will be in your consolidated brokerage statement, but you may have to hunt down the cost basis if it is not provided. In that case, please provide all activity in the stocks or funds from purchase date to sale date – year end statements are ideal).
- ☐ ☐ W-2's from all jobs worked in 2020 and year-end pay stubs.
- ☐ ☐ All forms 1099-INT and 1099-DIV showing interest and dividend income. This might be part of a consolidated brokerage statement.
- ☐ ☐ Transaction summaries for crypto-currency showing purchase price and other transaction values.
- ☐ ☐ Form W2-G if received, showing gambling and prize winnings, or details of amounts won (if no W2-G is provided). Please also provide gambling loss statements or documentation if applicable.
- ☐ ☐ Form 1099-G showing unemployment compensation.
- ☐ ☐ Amounts of gross hobby income received.
- ☐ ☐ Form 1099-NEC, if received, showing non-employee income. Or other documentation of non-employee income if no 1099-NEC was provided.
- ☐ ☐ Form SSA-1099 showing social security income.
- ☐ ☐ Form(s) 1099-R showing pension account distributions.
- ☐ ☐ Form(s) 1099-R showing retirement distributions.
- ☐ ☐ Form(s) 5498, or other documentation showing contributions to retirement accounts.
- ☐ ☐ Details on foreign bank accounts, including the bank name and the maximum value the account held during 2020.
- ☐ ☐ Details on cash contributions, including statements from the charities if you donated more than $250 to a single charity on any given day.
- ☐ ☐ Details on non-cash contributions, including the donee name, date of the contributions, a description of the items, and the fair market value of the items (usually what they would sell for at a thrift store).
- ☐ ☐ Form 1098-C or other written acknowledgment from the donee organization to verify the donation of a car or boat.
- ☐ ☐ Your IP PIN from the IRS.
- ☐ ☐ Any correspondence received from the state or IRS during 2020.
- ☐ ☐ Form 1099-C for cancellation of debt, if received.
- ☐ ☐ Moving costs associated with duty in the armed forces.
- ☐ ☐ K-12 education expenses, detailed by child and type of expense (tuition, field trip fees, transportation, technology, etc.). **Click here** for a list of qualifying expenses.
- ☐ ☐ Vehicle registration tabs or license plate numbers.
  2021 property tax statement or 2020 CRP.
- ☐ ☐ Please provide both the total miles driven on the vehicle in 2020, as well as the total miles driven for the business/work activity.

Please type in your notes and questions.

Your preparer will respond to these questions as they process your return.

Minnesota K-12 Education Subtraction

If you live in MN and paid for education expenses for children in K-12*, please provide the following information for each child. Please keep documentation for all expenses listed. For a more detailed list of allowable deductions and requirements, see the 'MN Education Subtraction Factsheet' on our website at www.woodburycpas.com/tools-and-resources.

1. Child's name and grade.

2. Tuition paid for private schools.

3. Expenses paid to others for transportation to and from school and for educational field trips during the normal school day (no overnight trips)

4. Tuition for academic and fine-arts camps (but not fees for food and lodging).

5. Fees for academic tutoring by a qualified instructor.

6. Tuition and fees for music, art or dance lessons provided by a qualified instructor.

7. Music instrument rental fees.

8. Fees for after-school enrichment programs such as science exploration, fine arts and study habits courses.

9. Expenses for required educational material, such as paper, pens, notebooks and nonreligious textbooks.

10. Expenses for home computer hardware and educational software.

11. Instructor fees for drivers education if it is offered by your school district-even if not taken through the school.

Please do not include any of the following:

1. Clothing, costumes or uniforms.

2. Food, including school lunches and snacks.

3. Travel and lodging expenses for overnight camps or trips.

4. Expenses related to sports.

For field trips outside the normal school day and for academic camps, we need a breakdown showing which portion of the fees were for academic instruction vs. food, transportation and lodging. You may need to ask the school or organization how the fees were determined. Without this breakdown, we cannot include expenses from these activities.

*This includes dependent students who have graduated during 2020, as long as the expenses were paid for and incurred during their high school education.