

Brown Financial LLC

## 2020 Tax Questionnaire

If any of the following items on any of the **THREE** pages pertain to you or your spouse for 2020, please check the appropriate box and provide additional information if necessary.

### PERSONAL INFORMATION

Yes	No	
		Did your marital status change during the year?
		Did your address change during the year?

### DEPENDENTS

Yes	No	
		Is another person providing more than half of your financial support and could you be claimed as a dependent on their tax return for 2019?
		Were there any changes in your dependents?
		Did you have any children under age 19 or full-time students under age 24 at the end of 2020, with total investment income in excess of \$2,200?

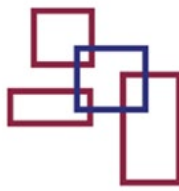
### HEALTH CARE COVERAGE

Yes	No	
		Did you apply for Health Care coverage on healthcare.gov? If so, did you download your Form 1095-A (Health Insurance Marketplace Statement)?

### INCOME

Yes	No	
		Have you received statements from all income you earned this year? See Tax Document Checklist for a list of the most common forms.
		Did you receive any unemployment or disability income? If so, have you downloaded your statement from the state website? NJ is not mailing statements anymore.

1 of 3



Brown Financial LLC

**BUSINESS**

Yes	No	
		Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, or trust?
		Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
		Did you use your car on the job (other than commuting to and from work?)

**PURCHASES, SALES AND DEBT**

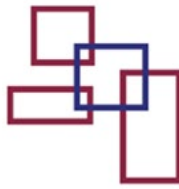
Yes	No	
		Did you buy or sell any stocks, bonds or other investment property in 2019?
		Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
		Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or electric vehicles? If so, have you claimed this credit in prior years?

**RETIREMENT PLANS**

Yes	No	
		Did you receive a <b>distribution</b> from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Was it due to COVID?
		Did you make a <b>contribution</b> to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
		Did you <b>transfer or rollover</b> any amount from one retirement plan to another retirement plan?

**EDUCATION**

Yes	No	
		Did you, your spouse, or a dependent incur any tuition expenses to attend a college, university, or vocational school?
		If yes, how many years have you been attending college?
		If yes, did you receive a distribution from a 529 Education Savings Account or a Qualified Tuition Program?



Brown Financial LLC

**CORONA VIRUS RELIEF**

Yes	No	
		Did you receive the 1 <sup>st</sup> economic impact (stimulus) payment? If so, how much? With income limitations, entitlements were: Single individuals \$1,200 and joint filers \$2,400, plus \$500 for each qualifying child
		Did you receive the 2 <sup>nd</sup> economic impact (stimulus) payment? If so, how much? With income limitations, entitlements were: Single individuals \$600 and joint filers \$1,200, plus \$600 for each qualifying child

**ESTIMATED TAXES**

Yes	No	
		Did you apply an overpayment of 2019 taxes to your 2020 estimated tax (instead of being refunded)?
		If you have an overpayment of 2020 taxes, do you want the excess applied to your 2021 estimated tax (instead of being refunded)?
		Do you expect your 2021 taxable income and withholdings to be different from 2020?

**MISCELLANEOUS**

Yes	No	
		Do you want to electronically file your tax return?
		May the IRS discuss your tax return with your preparer?
		Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
		Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?
		Did you or your spouse make any gifts to an individual that total more than \$15,000, or any gifts to a trust?
		For direct deposit of refunds or payment of taxes, did your bank account change from the one used on your 2019 tax return?
		Were you notified or audited by either the Internal Revenue Service or the State taxing agency?