

INFORMATION NEEDED TO PREPARE YOUR TAX RETURN

Taxpayer: _____
 SSN: _____
 Date of Birth: _____
 Occupation: _____
 IRS ID PIN# _____

Spouse: _____
 SSN: _____
 Date of Birth: _____
 Occupation: _____
 IRS ID PIN# _____

Blind Disabled Date of Death _____

Blind Disable Date of Death _____

Check if address is new

City Village Town

Address: _____

County: _____

City: _____

WI School District: _____

State - Zip _____

Secondary Phone: _____

Preferred Phone: _____

Preferred Email: _____

Preferred Gift Card for Referrals: Amazon Kwik Trip VISA Best Buy Target

How did you hear about us: Driving By Facebook Friend Postcard Search Publication

FILING UPDATES

Did your name change during the year? Yes No
 Did your address change during the year? Yes No
 Did your marital status change during the year? Yes No
 Did you become disabled or blind during the year? Yes No
 Can you be claimed as a dependent on another return Yes No
 Are you claiming children below that did not live with you? (School counts as time in your home.) Yes No
 Did you work outside of Wisconsin? Yes No

DEPENDENTS

Name	Relationship	SSN or ITIN	Date of Birth	Months Lived With You	Disabled	Full Time Student	Child Care Expenses Paid
1					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*For Additional Dependents, Fill out the Additional Dependent Organizer

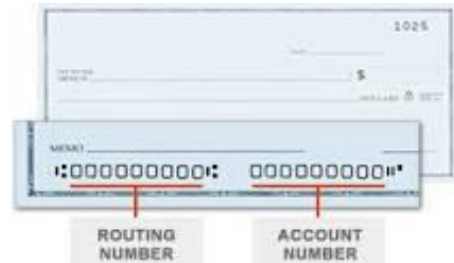
If any dependents being claimed on your taxes were required to file a tax return please provide a copy

BANK INFORMATION IF YOU WOULD LIKE DIRECT DEPOSIT OF ANY TAX REFUNDS

Bank Routing Number: _____
 Your Account Number: _____
 Bank Name: _____

Checking Saving

(Please Also Provide a Voided Check)



Initial & Date: _____

INCOME QUESTIONS

- Did you sell your home? Yes No
- Was any of your mortgage NOT used for your primary residence? (i.e. buy vehicle, pay debt etc.)? Yes No
- Did you have any crypto-currency? (e.g. bitcoin) Yes No
- Did you earn any foreign income or pay any foreign taxes?. Yes No
- Did you start a business during the year or do you expect to start one this year? Yes No
- Did you or your dependents take a distribution from a qualified tuition program (QTP) or 529 plan? Yes No
- Did you have any debt forgiven (i.e. student loans, credit card, home mortgage, etc.)? Yes No
- Did you make any taxable purchases from out-of-state last year in which sales tax should have been paid, but was not charged? Yes No
- If yes, amount of purchase(s) \$ _____
- Do you have children under 19 (or students under age 24) who had UNEARNED (Investment) income of more than \$2,200? Yes No

INSURANCE QUESTIONS

- Did you pay healthcare insurance premiums out-of-pocket? Yes No
- Did you pay long-term healthcare insurance premiums or receive benefits? Yes No
- Did you purchase Health insurance through the Government-Sponsored Marketplace (1095A is required) Yes No
- Do you have high deductible health insurance? Yes No
(Deductible of at least \$1,350 for individual or \$2,700 for family AND Out-of-Pocket Max of \$6,650/\$13,3000)
- Do you have a health savings account (HSA), Archer MSA or Medicare Advantage (MA) MSA? Yes No

RETIREMENT QUESTIONS

- Did you make any contributions to a Traditional or Roth IRA last year? Yes No
- Did you receive any distribution from a 401K, 403B, IRA, profit sharing, or pension plan? Yes No
- Did you roll funds into a Roth IRA during the year? Yes No
- If over 72, did you take the Required Minimum Distributions from retirement accounts? Yes No

MISCELLANEOUS CREDIT QUESTIONS

- Did you make any estimated payments this year? Yes No
- Did you pay rent last year? Yes No
- Rent Amount \$ _____
- Was Heat Included in Rent? Yes No
- Did you pay daycare or dependent care for your dependent under age 13? Yes No
- Are any of your dependents in College? Yes No
- Did you make gifts totaling more than \$15,000 to any one individual last year? Yes No
- Are you paying student loans? Yes No
- Did you pay anyone (over 18) \$2,100 or more to work at your home? (Cleaning, yard work, babysitting) Yes No
- Did you purchase any energy-efficient equipment during the year? Yes No
- Did you pay any expenses related to the adoption of an eligible child? Yes No

Initial & Date: _____

MISCELLANEOUS PERSONAL INFORMATION QUESTIONS

- Have you received any notices or correspondences from the IRS or state in the past 3 tax years? Yes No
- Do you (and your spouse) have a social security number that allows you to work and is valid? Yes No
- Were you a victim of Identity theft and have you been contacted by the IRS? Yes No
If yes, please furnish the 6-digit PIN issued to you by the IRS: _____ / _____
- Do you have money in any foreign company or bank? Yes No
- Do you expect any significant changes in income, withholding taxes or your tax liability for the coming year? Yes No
- Can someone else claim you on their tax return? Yes No
- Have you been disallowed or had reduced credits in previous years? Yes No
- Did you revise any prior-year divorce decrees that include alimony payments? Yes No
- Are you currently repaying the First-Time Homebuyer Credit?. Yes No
- May the IRS or a state tax agency discuss this return with us? Yes No
- Check the applicable boxes if you wish to contribute \$3 to the Presidential Election campaign fund. Taxpayer Spouse

ECONOMIC IMPACT PAYMENTS QUESTIONS

- Did you receive the stimulus payment in 2020? Yes No

Initial & Date: _____

2020 ECONOMIC IMPACT PAYMENTS QUESTIONS

Brew City Accounting and Tax does not know or have access to how much you received in stimulus (Economic Impact Payment) in 2020. It is your responsibility to provide accurate information to complete your tax return.

Did you receive the stimulus payment in 2020?

Yes

No

If yes, how much did you receive?

\$ _____

I certify the information provided to Brew City Accounting and Tax is accurate. I understand if I do not report the correct amount of Stimulus money received, my refund or amount due will change. I will hold Brew City Accounting and Tax harmless of any change in refund or amount due, and any penalty and/or interest assessed based on my reporting of the Economic Impact Payment.

Signature

Date

Print Name