

**SALAS ACCOUNTING LLC  
2020 INCOME TAX QUESTIONNAIRE  
UPDATE PERSONAL INFORMATION**

**NAME:**

**CELL PHONE:**

**EMAIL:**

If filing a joint return, these questions apply to both spouses.

**IDENTIFICATION**

- 1) In the last year, did you renew your driver's license or State ID?

*If, yes, we need a copy of the front & back of your ID.*

*If filing a joint return, the same is needed for your spouse.*

YES NO

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**ECONOMIC STIMULUS**

*The stimulus is not taxable but must go on the tax return.*

- 2) In **2020**, did you receive the economic stimulus, if so, how much?

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- 3) In **2021**, did you receive the economic stimulus, if so, how much?

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**UNEMPLOYMENT INCOME**

- 4) In 2020, did you collect unemployment income?

If yes, we need your 1099. One can be printed from the state online services website.

*If filing a joint return, the same is needed for your spouse.*

YES NO

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**CARES ACT**

In 2020, Congress passed the Cares Act, as part of the relief package the following was allowed:

- 5) IRA Required Minimum Distributions (RMD) were not required for tax yr 2020.

Did you still take an IRA distribution?

If, yes, please include your form(s) 1099-R for each distribution.

YES NO

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- 6) Early Retirement distributions up to \$100,000 were allowed - penalty fee.

Did you take an early retirement distribution?

If yes, please include your form(s) 1099-R for each distribution.

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**BANKING INFORMATION**

- 7) If receiving a refund, do you prefer direct Deposit?

If yes, has your banking information changed since last year?

If new, provide a copy of a voided check.

YES NO

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***The banking info will appear on the tax return. It is your responsibility to check the accuracy of the account information before signing the consent forms.***