

2020 TAX SEASON WORKSHEET

Please include this form with all tax paperwork

Along with this form, please provide me all W-2's, 1099s, 1098s, Social Security Statements, K-1s and other tax documents sent to you by employers, government agencies, financial institutions and child care providers. Don't forget 1099-B (Stock sales) and Form 1098 (Mortgage Interest Statement). Please do not send sales or medical receipts (List totals on this form)

Please check box if Spouse and Dependents information are the same as last year

Name:	Spouse:
DOB: SS#	DOB: SS#
Cell# E-Mail:	Cell# E-Mail:
Job Title:	Job Title:

Important: If you are a new client or had a drivers license renewal in 2020/2021, please enclose copy of Drivers License (front and back), or email a picture of DL to epalmertax@gmail.com. We will need spouses DL as well and any children if they are filing a return.

Home Address:	City/State/Zip:
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Home Phone:	**Note: Although personal exemptions were eliminated, please list child and other exemptions just as prior years. Many other credits are contingent upon this information, including Child Tax Credit, Earned Income Credit, American Opportunity Credit and Child Care Credit. Also include other dependents (parents etc). if you provide over half their support and they qualify to be your dependent.
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Dependents and Family Credits: (Please be certain no one else is claiming the same person for the credits)

Name:	M/F	DOB	SS#	Child/Parent/Other
Name:	M/F	DOB	SS#	Child/Parent/Other
Name:	M/F	DOB	SS#	Child/Parent/Other
Name:	M/F	DOB	SS#	Child/Parent/Other
Name:	M/F	DOB	SS#	Child/Parent/Other

Direct Deposit Information:	Child Care Credit:
Or provide voided check - no deposit slips please. Update annually.	(provide documentation from provider if possible)

Bank Name:	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>	Provider:
Routing:	Account#	Address:	

Total Student Loan Interest Paid last year \$	(Attach 1098-E)
City/State ZIP:	
Tax ID:	

Total Alimony Paid	\$	Recipient SS#	Amount Paid \$
(Alimony for divorces finalized after 1/1/2019 won't be taxable or deductible.)			

Alimony Received:	\$	For Which Child:
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Gambling Winnings:	\$	Please provide form W-2G	If you have more than one child care provider, please supply the annual documentation from the providers. Sometimes you have to request it.
Gambling Losses:	\$	Up to the extent of winnings. If casino winnings please provide win-loss report.	

(Please flip to the back of the page)

Amount of Economic Impact Payment Received (Stimulus) \$ _____ (attach IRS Notice 1444 if possible)