**By the Books, Inc Drop off checklist**

Please take a moment to help us ensure accuracy on your return by filling out this form to the best of your knowledge.

 You may leave this form with your tax information at the front desk or bring it with you if you have a scheduled appointment.

Name as it appears on your social security card:

Taxpayer\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Spouse\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you have a preferred Tax Preparer?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Phone\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you have your taxes prepared at By the Books, Inc last year? Yes\_\_\_\_\_\_\_\_No\_\_\_\_\_\_\_\_\_

If no, please enclose your last year's tax return copy if you filed.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

**New Client only**

Taxpayer date of birth\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Spouse date of birth\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Can you be claimed by someone else as a dependent?\_\_\_\_\_\_\_\_\_\_\_

 Dependents ( please have a copy of social security card if possible)  **List only if you have not done so elsewhere**

Name Relationship Date of Birth SSN Grade/Year Disabled? Health Ins?

 of College

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

If there is any question whether the child is claiming themselves or is being claimed by another please

speak with your preparer.

Did you file for a property tax refund last year?\_\_\_\_\_\_\_\_\_ If the amount of the refund is not enclosed

please get us the information as soon as possible.

**\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\***

**Property Tax Filing**

Filing for a property tax refund is a separate return. You must authorize us to prepare this for you if you so choose. There is a 60.00 additional fee for this. You are able to file for free online at MNDOR. If you want us to file your property tax return you must bring us your 2020 statement of property taxes payable that is sent from your county in late March (July for mobile home owners.) This return is due August 15 2 years from date you filed your original return. We usually prepare these during the summer months and mail you a copy when they are complete.

Is there a 2020 property tax statement enclosed in this information?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Will you be bringing in or mailing your statement when it arrives?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please check the boxes to all that apply. If the item applies and is not included in the information you are leaving with us at this time please note that below.

Income Expenses

|  |  |
| --- | --- |
|  | W2's from employer |
|  | Interest income – 1099 Int |
|  | Dividend income – 1099 Div |
|  | Social Security – SSA 1099 |
|  | Retirement/IRA withdrawal 1099 R |
|  | Stock Sales/Capital gains – 1099 B |
|  | Unemployment Insurance – 1099 G |
|  | Rental income \* |
|  | Self employment income\* |

\* Details should be enclosed.

|  |  |
| --- | --- |
|  | Unreimbursed work expenses |
|  | Continuing education for work |
|  | Medical Insurance  |
|  | Medical and Dental Expenses |
|  | Mortgage Interest |
|  | Real Estate Taxes |
|  | Car Tabs |
|  | Sales tax on new car/boat/plane |
|  | Education for k-12 / College |

1099 T necessary for any college education

Special deductions/ Credits

|  |  |
| --- | --- |
|  | Student loan interest |
|  | Child Care expenses |
|  | IRA Contribution |
|  | Sale of home |
|  | Purchase of home |
|  | Adoption |
|  | Gambling Winnings/Losses |
|  | Insurance settlement |
|  | Pay or receive Alimony |

 Were you or any members of your household

 not covered by health insurance the entire year?\_\_\_\_\_

 Details need to be enclosed.

 Were you or any members of your household

 enrolled in a health insurance plan through

 MNSure? \_\_\_\_\_\_\_\_\_\_\_\_\_\_

 We must have 1095A for each

 household member.

Is there any information that is not included in what you are leaving with us today?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please explain\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Any questions or concerns? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Thank you for choosing By the Books Inc.**