

INCOME TAX QUESTIONNAIRE
RUSSELL M. KHEDERIAN
CERTIFIED PUBLIC ACCOUNTANT
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2020

2020

Taxpayer's Name _____ Soc. Sec. No. _____

Spouse's Name _____ Soc. Sec. No. _____

Address _____

	<u>Occupation</u>	<u>D.O.B</u>	<u>Best Contact Number</u>	<u>Email Address</u>
Taxpayer's Information	_____	_____	_____	_____
Spouse's Information	_____	_____	_____	_____

DEPENDENTS:

<u>Name</u>	<u>Soc. Sec. No.</u>	<u>D.O.B.</u>	<u>School student for 5 months?</u>	<u>Does dependent live at home?</u>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____

MAKE SURE THAT ALL NAMES REPORTED MATCH SOCIAL SECURITY RECORDS

PLEASE RESPOND TO THESE THREE QUESTIONS:

1. Did you receive a 2020 economic stimulus check? Yes ___ No ___
 If yes please enter the amount received \$_____ and attach IRS Notice 1444 that you received (on White House letterhead) that shows the amount of your payment.
2. Do you wish to designate \$3.00 for the Presidential campaign fund? Yes___ No___
3. Did you make charitable contributions using cash-check-credit card? Yes___ No___
 If yes, see page 10 to deduct up to \$300 on your Federal return even if you do not itemize deductions. Donations in kind (e. g. Goodwill) do not count.

To the best of my knowledge and belief, the information included in this questionnaire is true, correct, and complete.

 Signature of Taxpayer Date Signature of Spouse Date

W-2 INCOME

BRING ALL W-2'S TO OUR MEETING

TAXPAYER:

1. Name of Employer # 1: _____

2. Name of Employer # 2: _____

SPOUSE:

1. Name of Employer # 1: _____

2. Name of Employer # 2: _____

INTEREST INCOME

(NOTE: BOX # REFERS TO BOX # ON 1099 INT FORMS)

TAXABLE:

ATTACH ALL 1099'S

<u>Payer:</u>	<u>Box 1 Interest</u>	<u>Box 2 Early w/d</u>	<u>Box 3 US Savings</u>	<u>Box 4 Fed w/h</u>	<u>Box 11 Bond Prem</u>	<u>Box 12 Bond Prem T'S</u>
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

NON-TAXABLE: (such as municipal bond interest)

_____	_____
_____	_____
_____	_____

At any time in 2020 did you have a financial interest in or signature authority over financial accounts with an aggregate value of \$10,000 or more located in a foreign country? Yes _____ No _____

If yes, you must file FinCen Form 114 by April 15, 2021 with the United State Treasury.

