VERIFICATION OF THE 2020 DATA PROVIDED

PLEASE SIGN THIS FORM AND RETURN IT WITH YOUR TAX DOCUMENTS
(NOTE: NO TAX RETURNS WILL BE RELEASED WITHOUT THIS SIGNED FORM.)

My Dear Friends,
As usual, please read this page, respond to the questions and sign it. **I can not prepare your return without it. I** apologize for the inconvenience, but the IRS requires confirmation of these issues. Please be sure you BOTH sign this (if married). If not, your return will be delayed. If you are coming in, please be sure to bring this with you, (signed by your mate, if coming in alone.)

Signing this confirms that all the data entered here and into the organizer, including information on notes, attachments, additional worksheets and schedules, are true to the best of my (our) knowledge.

I/we have supporting records for mileage, business expenses, charitable contributions of $250 or more, as well as all other expenses claimed. (Schedule A job-related expenses and investment expenses are no longer deductible) Cash Charity donations during 2020 up to $300 Are deductable even without Schedule A – But must KEEP YOUR Receipts!

***All* W-2's and 1099s reflecting my income are reported.** They are correct and complete, except as noted. (If there are errors, please provide an explanation if the 1099s are wrong.) **Income from all sources**, domestic (USA) and worldwide, has been reported. All income received in cash or via barter or trades has been reported.

*☐ I have a cybercurrency account – Details of ALL activity must be provided or we will not prepare your return.
*This is NOW the First Question on the Tax Return! Must report taxable transactions or penalties abound.

PLEASE MARK ____Yes, or ___ No: We employed household help in 2020. Household help = child or dependent care providers, tutors, housekeepers, gardeners, companions, etc. If they were paid at least $2,100 for the year, you **must** report the earnings and file the **W-2s and related payroll tax returns**. **(NEW DEADLINE – W2's must be filed to SSA by January 31st)**

☐ **Did you pay anyone $600** or more for services performed in the course of business? You must send THEM 1099s ASAP. **(DEADLINE - File with IRS by January 31st)** This includes attorneys, part-time help, landlords, rental property folks, commissions paid. Not sending them out will cost you the deduction for the expenses, if audited.

☐ **Business Assets –** I have made purchases of business assets in excess of $1,000 and can provide receipts.

☐ **Earned Income Credit (EIC)** - if you are eligible for the EIC, you certify the following: The child(ren) in question is (are) your legal dependent(s). You are not filing a fraudulent Head of Household return while you are married. Your child(ren) is (are) legal resident(s) of the United States. You are not collecting AFDC. Nobody else is claiming you as a dependent.

☐ **Assets outside the US.** I had financial accounts outside the U.S. that had a balance of $10,000 or more for even a minute during 2020. ***&/or*** I have assets outside the United States with a fair market value of $100,000 or more at the end of 2020 OR $150,000 or more during 2020 if filing jointly ($50,000/$75,000 if single). **FinCEN Form 114** must be filed **electronically** by **DEADLINES 04/15/2021 or with extension by 10/15/2021**. The FATCA (Form 8938) form is filed with your personal return. Penalties for failure to file start at $10,000, up to 100% of the balances in the accounts.

IMPORTANT! Health Insurance Coverage – California now requires this – IRS no longer does:
PLEASE MARK ____Yes: Everyone including dependents were covered ALL Year)
If you receive any of the following Health Coverage Forms (1095-A, 1095-B or 1095-C) please attach.

☐ I own rental real estate. Number of days Personal Use: _____ Fair Rental Days:_____

☐ I have started a new business in 2020 and will provide you with the set-up documents and employer ID information.

☐ My estimated payments exceed $20,000/year. Help me set up an IRS EFTPS & FTB (CA) account to make deposits.

☐ I am a Registered Domestic Partner in (State)_____ I must file a joint State return with my partner.

☐ **Note: There are major changes affecting my 2020 tax return.** ☐ **I have read the accompanying letter.**

Total cost of 2020 purchases made online or out of state or without paying sales tax. This must be reported on your State tax return. For State Return **$**_____ **or Please mark ___ No, if none.**

►
---------- ---------- Date _____
Your Signature Print your name

►_____ _____ Date _____
Your Spouse's Signature Print your spouse's name