



**NEW FOR 2020 TAX YEAR - PAPERLESS, SECURE EMAIL PACKAGE**

If you select this option OA Tax will email you the completed returns, signature forms, payment vouchers and estimated tax vouchers with instructions. If selected, there will be **NOTHING** mailed back to you including your documents. All documents will be scanned into our secure Smartvault system and then destroyed. You also **MUST** prepay our fee by filling out credit card information in order to select this option. Keep in mind that there are certain tax situations where filing this way is not a possibility. If that is the case you will default to the normal mailing method.

CHECK THIS BOX IF YOU WANT THIS NEW OPTION FOR TAX YEAR 2020

**STIMULUS INFORMATION**

1. Did you receive the first stimulus payment in 2020?      **yes**      **no**      How much did you receive ? \_\_\_\_\_
2. Did you receive the second stimulus payment in 2021?      **yes**      **no**      How much did you receive ? \_\_\_\_\_

PLEASE INCLUDE ANY CONFIRMATION OF AMOUNTS RECEIVED

**FOREIGN ACCOUNT REPORTING**

- yes**      1. Did you have a foreign financial account including an overseas bank account or even have signature authority with a foreign account?
- no**
- yes**      2. If Q1 is yes, did the maximum value of all the foreign financial accounts in aggregate exceed **\$10,000** at any time in 2020?
- no**
3. If Q2 is Yes, then include additional information on the foreign account(s). Include the **highest value of the account in 2020, country location, account number, name & address of the financial institution.**

**VIRTUAL CURRENCY**

- yes**      1. Did you receive, sell, send, exchange or otherwise acquire any financial interest in a virtual currency at any time in 2020?
- no**

**IF YES PLEASE INCLUDE DETAILS ON SEPARATE SHEET OR USE OUR WORKSHEET FOR SALES**

**HEALTHCARE**

- yes**      1. Were you covered by an Employer or Retirement health care plan or Medicare the **entire** tax year 2020?
- no**
2. Where did you receive your coverage?
- Employer/Retirement/Medicare..... No forms are necessary (We do not need any 1095-B or 1095-C)
- Exchange or Marketplace..... You should receive Form 1095-A, you must send.

**DRIVERS LICENSES**

**You must provide photocopies (Front & Back) of Drivers Licenses or State issued ID for BOTH Taxpayer and Spouse.**







