

2021 Tax Filing Questionnaire

Date Received: _____

Contact Name: _____ Number: _____

Returning 2020 Client _____ New Client _____ Referral Name: _____

Would you like an Electronic Copy _____ or Paper Copy _____ of 2021 Tax Return

Name: _____ Spouse Name: _____

Your DL#: _____ Issue Date: _____ Exp Date: _____ DOB: _____

Spouse DL#: _____ Issue Date: _____ Exp Date: _____ DOB: _____

Address: _____

City, State & Zip _____ County: _____

Phone Number: _____ Email Address: _____

(Must provide email for Electronic Copy)

Did your **Marital Status** change in 2021? Yes or No If yes please explain: _____

Direct Deposit Yes or No. If yes, please provide bank information or voided check

Checking _____ or Savings _____

Bank Name _____ Routing # _____ Account # _____

List **Dependent(s)** you are claiming on your return:

Name _____ SS# _____ DOB _____ Relationship _____

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Dependent Proof of residence required if claiming Child Tax Credit (i.e., insurance card, doctor bill, school record) showing child's name with home address.

Do you have any **Dependents** who must File a tax return? Yes or No

Did you receive Form 6475 for the 3rd **Stimulus payment** of \$1400 per person: Yes or No
If yes, provide a copy: Yes or No If No, what amount did you receive \$_____

Did you receive Form 6419 for the monthly **Child Tax Credit**: Yes or No
If yes, provide a copy: Yes or No If No, what amount did you receive \$_____

Did you have private out of pocket **Health Insurance Premiums**? Yes or No - If yes, how much _____

Do you have an **HSA** (Health Saving Account) Yes or No If yes, do you have Form **1099-SA** Yes or No

Did you receive **Health Insurance Market Place** Statement? Yes or No -
If yes, do you have **Form 1095-A** Yes or No

At any time during 2021 did you sell or trade any **Virtual Currency**? Yes or No - If yes, provide statement

Did you receive **Unemployment Benefits** in 2021? Yes or No - If yes, did you have Form **1099G**: Yes or No

Did you have **Self Employment Income**? Yes or No If yes, provide income and expenses.

Did you receive payment on business transaction on eBay, PayPal, Cash App over \$600 each? Yes or No –
If yes, do you have form **1099K**? Yes or No

Did you take a **Distribution** from an **IRA or 401K** account in 2021? Yes or No – If yes, amount and
explanation:

Did you have a **401k** with former employer or **Old Annuity** that needs review? Yes or No

Did you make any **Donations** by cash or check to charitable organizations in 2021? Yes or No - If yes, how much did
you donate? _____

Did you or dependents have any **College Expenses**? Yes or No – If yes, do you have Form **1098-T** Yes or No

Did you pay any student loan interest in 2021? Yes or No – If yes, do you have form **1098-E** Yes or No

If you paid **Estimated Taxes**, please fill in the information below:

<u>Federal</u>		<u>State</u>	
Date_____	Amount_____	Date_____	Amount_____
Date_____	Amount_____	Date_____	Amount_____
Date_____	Amount_____	Date_____	Amount_____
Date_____	Amount_____	Date_____	Amount_____

For Office Use Only

Completed 2021 Return: Date We Called Client for P/U _____

Charged\$_____ Invoice Created _____