



Please make sure to answer these questions and bring this to your appointment.

If you are unsure about any of these questions, please ask us!

Yes No

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2021 Changes

Did you receive a third stimulus payment? If so how much? \_\_\_\_\_  
Please provide IRS Notice 1444C (3rd stimulus notice)  
Did you receive an advanced Child Tax Credit for eligible dependants?  
Please provide IRS Notice 6419 or list payments you received from July-December  
July \_\_\_\_\_ Aug \_\_\_\_\_ Sep \_\_\_\_\_ Oct \_\_\_\_\_ Nov \_\_\_\_\_ Dec \_\_\_\_\_  
Did you donate \$300 (\$600 if married) or less in cash payments to eligible charities? (Provide documentation)

- 1. If you are due a refund, would you like it direct deposited into your bank account?  
Bank Name \_\_\_\_\_ Routing Number \_\_\_\_\_  
Account Number \_\_\_\_\_ Is it a savings account? Yes No
- 2. If you have a balance due, would you like it electronically withdrawn from your bank account?
- 3. Were you legally married as of December 31, 2021?
- 4. Are you considered unmarried and provide more than 50% of support for a child or dependent who lived with you over half the year? If so, please list name of child or dependent \_\_\_\_\_
- 5. Are there any changes to the children you may claim as dependents for 2021?  
Please provide proof of residency or Form 8332
- 6. Did you purchase your health insurance coverage from the ACA Marketplace? Attach Form 1095-A
- 7. Did you move during 2021?
- 8. Did you earn income in a state other than the state you live in?
- 9. Did you receive any notices from the IRS or the state taxing agency? If yes, please attach.
- 10. Did you receive any type of prize, award, or gambling winnings?
- 11. Did you receive jury duty or alimony pay?
- 12. Did you receive, sell, send, exchange, or dispose of any financial interest in any virtual currency?
- 14. Did you make any gifts to any one person in 2021 in excess of \$15,000?
- 15. Did you pay wages to any household employees (such as a nanny)?
- 16. Did you have any debts forgiven or cancelled in 2021?
- 17. Did you pay any college tuition during 2021? How much was paid \$ \_\_\_\_\_ (attach form 1098-T)
- 18. Did you pay any private school tuition cost for Grades K -12? (Provide documentation from the school)
- 19. Did you pay off any student loans using funds from a 529 savings plan?
- 20. Did you purchase, sell, or refinance your house? If yes, please provide the closing information.
- 21. Do you have any home equity loans where any proceeds were not used to improve your residence?
- 22. Did you have any foreign assets during the year?
- 22. Did you make any purchases in 2021 from out-of-state companies that did not charge sales tax?  
If yes, please provide the amount of purchases subject to your state's Use Tax: \$ \_\_\_\_\_
- 23. Are you expecting any significant changes to 2021's income, deductions, or credits?
- 24. Do you have any tax or tax planning questions that you would like to discuss with us?
- 25. Do you have an identity protection PIN used to file your return due to identity theft?  
Please provide a copy of the letter with your PIN number on it.

Business and Rental Questions (skip this section if not applicable)

- 1. Did you start a new business or purchase any rental property during 2021?
- 2. Did you purchase (or begin using) any assets for your business?
- 3. Did you sell (or stop using) any assets for your business?
- 4. Did you make any business payments that require you to issue 1099s? (Not needed for rentals)
- 5. If yes, have you filed all 1099s?
- 6. Do you have all documentation to support all business expenses (Schedule C)
- 7. Do you have all documentation to support all rental expenses (Schedule E - If applicable)
- 8. Did you spend 250 or more hours of rental service activity? If so, please attach log.
- 9. Do you have mileage log for business mileage? If so, please attach log.

Taxpayer Signature \_\_\_\_\_

Spouse Signature \_\_\_\_\_

Please provide a copy of your current Driver's License or State ID with your tax documents to avoid any delay in receiving your tax refund.

| Taxpayer | State | License # | Issue Date | Expiration Date |
|----------|-------|-----------|------------|-----------------|
| Spouse   | State | License # | Issue Date | Expiration Date |

Did you know you can use your refund to purchase up to \$5,000 in Federal I Bonds? Please ask us for details!