

2021 Tax Year Questionnaire

Taxpayer (s) Name: _____

Please check the appropriate box and include all necessary details and documentation.

Yes No

Personal Information

Please provide the following information so we ensure our records are up to date:

Best phone number to reach you at: _____

Is this a mobile number? Yes No

Please provide the best email address for each Taxpayer and spouse:

Taxpayer _____

Spouse _____

1. Did your marital status change during the year? Yes No
If yes, explain: _____
- a. Did you live separately from your spouse during the last six months of the year? Yes No
- b. Do you have a separate decree, instrument, or agreement and are not living in the same household by the end of the year? If yes, please provide document. Yes No
3. Did your address change from last year? If yes, please provide new address. Yes No
4. Can you be claimed as a dependent by another taxpayer? Yes No
5. Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? If yes, please provide new information. Yes No
6. Do you, your spouse (if applicable), and any dependents have a taxpayer identification number (SSN, ITIN, or ATIN)? If yes, please provide numbers. Yes No
7. Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter. Yes No
8. Did you reside in or operate a business in a Federally declared disaster area? Yes No
The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires.

COVID-19 Information

1. Did you receive an Economic Impact Payment (EIP3)? Yes No
If yes, Please provide **Letter 6475**.
2. Did you receive an adjustment to your refund or balance due for the exclusion of unemployment compensation and/or Advance Premium Tax Credit as a result of the American Rescue Plan Act (ARPA)? Yes No
3. Did you receive advanced Child Tax Credit (CTC) payments in July, August, September, October, November, and December? If yes, please provide **Letter 6419**. Yes No
4. Did you receive a Paycheck Protection Program (PPP) loan? Yes No
If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness? Yes No
5. Are you a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state? Yes No
6. Did you receive emergency leave sick pay? Yes No
7. Did you receive emergency family leave wages? Yes No
8. Did you receive any special unemployment benefits or compensation under the _____ Yes No

- Coronavirus Relief Act during the year?
- 9. If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you needed?
- 10. If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to your son or daughter under the age of 18?
- 11. If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to another?

Dependent Information

- 1. Were there any changes in dependents from the prior year?
If yes, explain: _____
- 2. Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,200?
- 3. Do you have dependents who must file a tax return?
- 4. Did you provide over half the support for any other person(s) other than your dependent children during the year?
- 5. Did you pay for child care while you worked, looked for work, or while a full-time student?
- 6. Is there any other person(s) who lived with you more than half the year but not claimed by you on your 2020 tax return?
- 7. Did you pay any expenses related to the adoption of a child during the year?
- 8. If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?
- 9. Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft? If yes, attach the IRS letter.

Purchases, Sales and Debt Information

- 1. Did you start a new business or purchase rental property during the year?
- 2. Did you sell, exchange, or purchase any assets used in your trade or business?
- 3. Did you acquire a new or additional interest in a partnership or S corporation?
- 4. Did you sell, exchange, or purchase any real estate during the year?
- 5. Did you purchase or sell a principal residence during the year?
- 6. Did you foreclose or abandon a principal residence or real property during the year?
- 7. Did you acquire or dispose of any stock during the year?
- 8. Did you take out a home equity loan this year?
- 9. Did you refinance a principal residence or second home this year?
- 10. Did you sell an existing business, rental, or other property this year?
- 11. Did you lend money with the understanding of repayment and this year it became totally uncollectable?
- 12. Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)?
- 13. Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?

Income Information

- 1. Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?
- 2. Did you receive any income from property sold prior to this year?
- 3. Did you receive any unemployment benefits during the year?
- 4. Did you receive any disability income during the year?
- 5. Did you receive any Medicaid waiver payments as difficulty of care during the year?
- 6. Did you receive tip income not reported to your employer this year?
- 7. Did any of your life insurance policies mature, or did you surrender any policies?

- 8. Did you receive any awards, prizes, hobby income, gambling or lottery winnings?
- 9. Did you receive any income considered to be nonemployee compensation?
- 10. Do you expect a large fluctuation in income, deductions, or withholding next year? If yes, please provide details.
- 11. Did you have any sales or other exchanges of virtual currencies (including from an airdrop or a hard fork, or used virtual currencies to pay for goods or services)?

Retirement Information

- 1. Are you an active participant in a pension or retirement plan?
- 2. Did you receive any Social Security benefits during the year?
- 3. Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
- 3a. If yes, were any withdrawals due to a Federally declared disaster?
- 3b. If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2021?
- 4. Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?
- 5. Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, please provide details.

Education Information

- 1. Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?
- 2. Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent?
- 3. Did you make any withdrawals from an education savings or 529 Plan account? If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?
- 4. Did you make any contributions to an education savings or 529 Plan account?
- 5. Did you pay any student loan interest this year? If yes, please include Form 1098-E
- 6. Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

Health Care Information

- 1. Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.
- 2. Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, please include Form 1095-A
- 3. Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family?
- 4. Did you make any contributions to a Health Savings aAccount (HSA)? If yes, please include Form 5498-SA
- 5. Did you receive any distributions from a Health Savings Account (HSA) this year? If yes, please include Form 1099-SA
- 6. Did you pay long-term care premiums for yourself or your family? If yes, how much did you pay? _____
- 7. Did you make any contributions to an ABLE (Achieving a Better Life Experience) account?
- 8. Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account?
- 9. If you are a business owner, did you pay health insurance premiums for your employees this year?
- 10. Did you receive any Health Coverage Tax Credit (HCTC) advance payments?

Itemized Deduction Information

- 1. Did you incur a casualty or theft loss or any condemnation awards during the year?
 - 1a. If yes, did the loss occur in a Federally declared disaster area?
- 2. Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
If yes, please provide detail of your expenses.
- 3. Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)?
If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made.
- 4. Did you donate a vehicle or boat during the year?.
If yes, include Form 1098-C
- 5. Did you pay real estate taxes for your primary home and/or second home?
If yes, please provide details.
- 6. Did you pay any mortgage interest on an existing home loan?
If yes, please provide Form 1098 for each mortgage held/
- 7. Did you incur interest expenses associated with any investment accounts you held?
- 8. Did you make any major purchases during the year (cars, boats, etc.)?

Miscellaneous Information

- 1. Did you make gifts of more than \$15,000 to any individual?
- 2. Did you utilize an area of your home for business purposes? (self-employed only)
- 3. Did you retire or change jobs this year?
- 4. Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?
- 5. Did you pay any individual as a household employee during the year?
- 6. Did you make energy efficient improvements to your main home this year?
If yes, please provide detail.
- 7. Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
- 8. Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?
- 9. Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?
- 10. Did you receive correspondence from the State or the IRS?
If yes, explain: _____
- 11. Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?