

Please answer all questions

CIRCLE ONE

11. Have you, your spouse or your dependents taken any college or tech school courses in 2021? (You must provide the 1098-T from the educational institution) Yes or No
12. Have you paid interest on any student loans in 2021? Yes or No
13. Have you bought, sold, or had your Home foreclosed on in 2021? Yes or No
14. Have you had any Cancellation of Debt in 2021? (Such as credit cards, auto loans, forgiveness of debt, repossession, etc) Yes or No
15. Have you made any Energy Efficient improvements to your personal residence in 2021? (Such as Solar, Geothermal, Window, HVAC, Doors, Roof, Gas Hot Water Heater, etc.) Yes or No
16. Did you make any OUT OF STATE purchases (by phone, internet, mail order, etc) that the seller DID NOT collect sales or use tax on? (ex: Amazon, Ebay, etc.) Yes or No
17. Did you sell stock, timber, real estate, or any other assets in 2021? Yes or No
18. Did you receive Social Security benefits in 2021? (if yes please provide your 1099-SSA form) Yes or No
19. Did you receive any lottery winnings, jury duty pay or alimony in 2021? Yes or No
20. Did you have any Virtual Currency (Bitcoin, Litecoin, Ethereum, etc.) or any Foreign Bank Accounts or Trusts? Yes or No
21. For the year 2021 did you have health insurance for you and your family With the Affordable Care Act also known as Healthcare.gov (1095-A Form is required) Yes or No
22. How much 3rd Stimulus (Economic Impact Payment) did you receive in 2021 \$_____ (Please Initial) _____ (This is not taxable but must be reported, IRS Letter #6475 should have been received, please provide a copy for your tax return.)
23. How much Advance Child Tax Credit did you receive for July - December 2021 \$_____ (Please Initial) _____ (IRS Letter #6419 should have been received, please provide a copy for your tax return.)
24. Did you make any Charitable CASH/CHECK Contributions in 2021 Amount \$_____ Yes or No (Church, United Way, St. Jude's, or any 501 (c)(3) organization)
25. If you would like DIRECT DEPOSIT of any refunds, please provide your direct deposit information WITH your tax documents.

Please note in the section below any other items you would like to discuss with your tax preparer:

NOTES:

Our fees are based on the size, complication and forms on your tax return. These fees cannot be accurately determined until the completion of the return. However, if price is a concern, please ask the preparer for a cost estimate prior to the start of your return. The estimate will be within 10% of the final fee. Once the return is started you will be responsible for the fee.

Please sign and date:

Taxpayer: _____ Date: _____

Spouse: _____ Date: _____