

Please review and answer the following questions.

Taxpayer Name				Spouse Name			
SSN				SSN			
Email				Email			
Phone Number				Phone Number			

What is your current address?

Did your marital status change before December 31st of the tax year?

Yes/No What changed?

Do you have dependents?

Yes/No If yes, please provide child's name, date of birth, and social security number

Name		Date of Birth		SSN	
Name		Date of Birth		SSN	
Name		Date of Birth		SSN	
Name		Date of Birth		SSN	

Did you have any child or dependent care expenses?

Yes/No If yes, please include care provider's name, address, SSN, and amount.

Did you buy or sell stocks, bonds, mutual funds or other investment properties?

Yes/No If yes, please provide copy of 1099-B

Did you buy, sell or refinance your home?

Yes/No If yes, please provide a copy of your closing documents and form 1099-S.

Did you donate money, household goods, cars or stock?

Yes/No If yes, please provide institution name, amount, and brief description of donations

Did you incur any tuition or continuing education expenses?

Yes/No If yes, please provide copy of 1098-T or supporting documents

Please review and answer the following questions.

Did you receive any of the following IRS documents? Form 1095-A, 1095-B, or Form 1095-C?

Yes/No If yes, please provide copy of the form(s) received

Do you own or have a controlling interest in foreign financial institutions, businesses or investment funds?

Yes/No

Do you want to file your tax return electronically?

Yes/No If yes, you will be provided with authorization pages to sign

Do you wish to pay balance due OR receive your refund electronically?

Yes/No If yes, please provide your bank name, routing number, and account number.

Bank _____ Routing # _____ Acct # _____

Did you pay estimated taxes for the 2021 tax year?

	Date	Amount	Date	Amount	Date	Amount	Date	Amount
Federal								
State								

Please list any questions or other concerns you might have.

If you received Economic Impact Payments (Stimulus), please provide Dates and Amounts of payments received, per individual.

Recipient	_____	Date	_____	Amount	_____
Recipient	_____	Date	_____	Amount	_____

Have you bought or sold crypto currency?

Yes/No If yes, please provide Form 1099-K or supporting documents.

Forms you may need to attach for supporting documentation:

- | | |
|---|---------------------------------------|
| ----- 1098 R.E. Tax & Mortgage Interest | ----- Business Income & expenses |
| ----- 1098-E Student Loan | ----- Home purchase closing documents |
| ----- 1098-T Tuition Statement | ----- Home sale closing documents |
| ----- 1099-B Broker & Barter Proceeds | ----- K-1 Partnerships |
| ----- 1099-DIV Dividends | ----- K-1 Scorp |
| ----- 1099-G Unemployment Compensation | ----- K-1 Trusts |
| ----- 1099-INT Interest | ----- Rental Income & Expenses |
| ----- 1099-K Third Party Transactions | ----- RRB-1099 Railroad Retirement |
| ----- 1099-Misc Income | ----- SSA-1099 Social Security |
| ----- 1099-NEC NonEmployee Compensation | ----- W2 Wage & Tax Statement |
| ----- 1099-Q Qualified Education | ----- W2-G Unemployment Compensation |
| ----- 1099-R Retirement | |