



2021 Tax Questionnaire

Please complete and return this questionnaire with your tax data

Name(s) _____

Address _____ City _____ State _____ ZIP _____

Name or Initials for phone

Cell Phone (_____) _____ Email _____

Name or Initials for phone

Cell Phone (_____) _____ Email _____

Home Phone (_____) _____

- I want my return:
- Emailed copy via our secure file transfer software
 - Placed in my H&S Portal
 - I will pick it up
 - Mailed to me

Yes No PERSONAL INFORMATION

- Did your marital status change during the year? If so, please explain: _____
- If yes, did you change your name with the Social Security Administration?
- Did your address change from last year? If so, please fill out the address section above.
- Were there any changes in dependents from the prior year? If so, please explain: _____

Yes No MISCELLANEOUS INFORMATION

- Do you have any foreign bank accounts?
- Did you sell any cryptocurrency in 2021? If so, please provide details of the sale and original purchase of the currency.
- Did you receive round 3 of the **stimulus payments (\$1,400/person maximum) in 2021?** If so, **please confirm amount received.**
\$ _____ (This information can be found on IRS Letter 6475 that is to be mailed to all taxpayers this month)
- Did you receive an **advanced child tax credit payment?** If so, **how much did you receive?** \$ _____
See enclosed insert for ways to check!

Direct Deposit (check all that apply)

- Direct deposited your refund last year? If so, would you like to again?
 - Same bank account?
 - Different Account? Please provide a voided check
- Did not direct deposit last year but would like to this year? Please provide a voided check

INCOME

- Workin' for a livin'? If so, we need all your **W-2s.**
- Found yourself or your spouse unemployed? We'd like your **1099Gs.**
- Making some interest on your money? It's your **1099-INT** we need.
- Invested in the market? We'll need your **1099-DIVs and 1099Bs.**
- Enjoying social security benefits? Congrats, we need your form(s) **SSA-1099.**
- Receiving retirement income? It'll be **1099-R** forms that we will want to see.
- Are you a partner in a partnership or a shareholder in an S-Corporation? We are going to need your **K-1 form(s).**
- And the same if you are receiving any income from a trust or estate.
- Got lucky at the casino or other gambling? If so, we could use your form **W-2G(s)** and your **expenses/losses.**
- If you received a state or local tax refund in 2021, please also bring in forms **1099-G** that you receive.



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INCOME (continued)

- Rent your property in 2021? Here's what we would like:
 - Your **income, including 1099-MISC.**
 - Your **expenses, including mileage.**
- Self-employed? Good for you! Please bring in all your **records of income, expenses, assets, and liabilities.**
- Farming? That's great! We'd like the **same records as for self-employed.**
- Sell your home? Please bring in form **1099-S, closing statement, and your cost of the home you sold.**
- Any other income? Please bring in **1099-MISC form and records of any related expenses.**

EXPENSES

- Contribute to an **IRA, SEP, SIMPLE, or plan to do so by 4/18/22?** We will want **amounts contributed for you and/or spouse.**
- How about an **HSA, or plan to do so by 4/18/22?** We will need the **same information as above and form 1099-SA.**
- Are you an educator? We will want your **unreimbursed expenses.**
- In the reserves? We salute you and request your **expenses.**
- Move while on active duty? We'd like to know **distance and your direct costs.**
- Paying on student loans? **1098-Es** we could use.
- Speaking of education ... If you or your child is attending college, we will need your form **1098-T, as well as the cost of items like books, supplies, and equipment.**
- Paying/receiving alimony for a divorce that was finalized by 12/31/18? Please provide amount paid/received in 2021.
- Itemize your deductions? If so, here's what we need:
 - List of your medical deductions.**
 - Property, sales tax, and license tab fees.**
 - Mortgage / home-equity loan interest paid to buy, build or improve your home.**
 - List of charitable contributions paid and the donation receipts (don't forget about those noncash donations).** *Even if not itemizing, you can claim up to \$300 for single, \$600 for married filing joint.*
 - Gambling losses incurred with gambling winnings.**
- Paying for childcare while working? We'll want **name, ID number, address, and amount paid to the provider.**
- Make energy-efficient home improvements in 2021? Please provide **details and costs.**
- Receive an ACA/Marketplace premium tax credit? We are going to need your **1095-A form(s).**
- Did you make any out-of-state purchases for which the seller did not collect state sales or use tax? If so, we'll need the amount of purchases.
- Were you a victim of identity theft within the last year? We will need a **copy of your drivers license.** If you have received a **letter from the IRS with an assigned IP PIN number** for the 2021 tax year, please provide that, as well.

We tried to cover every situation, but please provide any other information you think we may need!

Your Signature _____ Date _____