

Tax Preparation Questionnaire for Tax Year 2021



Basic Information

Taxpayer

Spouse

Name	_____	_____
Phone Number	_____	_____
Email Address	_____	_____
Preferred Method of Contact	_____	_____

Stimulus Check

• Did you receive the third stimulus check (around March 2021)?	Yes	No
○ If yes, how much did you receive? Please attach IRS Letter 6475.	_____	

Child Tax Credit

• Did you receive any Advance Child Tax Credit payments in 2021?	Yes	No
○ If yes, how much did you receive? Please attach IRS Letter 6419.	_____	

Bank Information

Account Type	Is this a Checking or Savings account?
Bank Name	_____
Routing Number	_____
Account Number	_____

If you are due a **REFUND**, do you want direct deposit? (**STRONGLY RECOMMENDED**) Yes No

If you **OWE** tax, would you like it automatically withdrawn? (**STRONGLY RECOMMENDED**) Yes No

Dependents

• Are you dropping any dependents?	Yes	No
○ If yes, who?	_____	
• Are you adding any dependents?	Yes	No
○ If yes, who? (Name, DOB, and SSN)	_____	

Address

• Did you move in 2021?	Yes	No
○ If yes, when did you move?	_____	
○ What is your new address?	_____	
○ For MD residents, what county do you live in?	_____	
○ For PA residents, what is your Boro/Twp and School District?	_____	

At any time during or for 2021, did you and/or your spouse:

- | | | |
|---|-----|----|
| • Did you make any charitable cash contributions (even if you believe you won't be itemizing)? | Yes | No |
| • Receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (i.e. Bitcoin, EOS, Litecoin, etc.)? | Yes | No |
| • Make any quarterly estimated tax payments to the Federal, State, or Local government? If yes, please provide payment amounts and dates paid on a separate page. | Yes | No |
| • Receive an Identity Protection PIN (IP PIN) from the IRS? If yes, attach the CP01A Notice. | Yes | No |
| • Buy or sell any stocks, bonds, or other investment property besides your investments with our firm? | Yes | No |
| • Receive a distribution from or make a contribution to a retirement plan or IRA? | Yes | No |
| ○ If you received a distribution, what type of plan? (IRA, Roth IRA, Inherited, etc.) | | |
| ○ If you made an IRA contribution, how much? | | |
| • Contribute money to a charity directly from an IRA? (Qualified Charitable Distribution) | Yes | No |
| • Make a non-deductible IRA contribution on Form 8606? Have you in the past? | Yes | No |
| • Pay a premium for a long-term care (LTC) policy purchased in Tax Year 2001 or later? | Yes | No |
| • Purchase, sell, or refinance your principal home (or second home)? | Yes | No |
| • Contribute to a 529 Education Plan? | Yes | No |
| • Incur any tuition or education expenses to attend a college/vocational school? Did a dependent? | Yes | No |
| • Withdraw funds in 2021 from a Home Equity Loan/Line of Credit? If yes, include closing papers. | Yes | No |
| ○ What did you do with the proceeds? | | |
| ○ Have you completed any household improvements within the past two years? | Yes | No |
| ○ If yes, please provide the details of what, where, and how much was spent. | | |
| • Have any OUT OF STATE purchases or online purchase that you did not pay sales tax? | Yes | No |
- *Please note Maryland and Pennsylvania require Use Tax on these when sales tax is not collected.
- If yes, total amount of purchases: _____

Health Insurance

- | | | |
|---|-----|----|
| • Did your family have coverage all 12 months? | Yes | No |
| ○ If no, who was not covered? _____ | | |
| • For how many months? _____ | | |
| ○ Was your coverage through the Health Insurance Marketplace? If yes, attach Form 1095-A. | Yes | No |

For Alabama, New Mexico, New York, and Ohio residents ONLY

- | | <u>Taxpayer</u> | <u>Spouse</u> |
|---------------------------|-----------------|---------------|
| • Driver's License Number | _____ | _____ |
| • Issue Date | _____ | _____ |
| • Expiration Date | _____ | _____ |