



# 2021 Taxpayer Information

Please complete all Applicable Sections

## Taxpayer

Last Name..... \_\_\_\_\_  
 First Name..... \_\_\_\_\_  
 SS Number..... \_\_\_\_\_  
 Occupation..... \_\_\_\_\_  
 Date of Birth.... \_\_\_\_\_  
 Email Address.. \_\_\_\_\_  
 Phone Number \_\_\_\_\_

## Spouse

Last Name..... \_\_\_\_\_  
 First Name..... \_\_\_\_\_  
 SS Number..... \_\_\_\_\_  
 Occupation..... \_\_\_\_\_  
 Date of Birth.... \_\_\_\_\_  
 Email Address.. \_\_\_\_\_  
 Phone Number \_\_\_\_\_

**Best Contact Number:**     Taxpayer     Spouse     Other: \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

City/Village/Township of: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**Filing Status:**    Single \_\_\_\_\_ Married filing Joint \_\_\_\_\_ Head of Household \_\_\_\_\_

## Dependents you have the *legal right* to claim in 2021:

<u>Name</u>	<u>Date of Birth</u>	<u>Social Sec. #</u>	<u>Relationship</u>	<u>Months lived with you in 2021</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

## ➤ General:

- Dollar amount of THIRD Economic Stimulus Payment received in 2021 \$ \_\_\_\_\_ YES NO
- Did you receive any unemployment compensation in 2021? (1099-G required)  YES  NO
- Did you receive any Advanced Child Tax Credit? (provide IRS letter 6419)  YES  NO
  - If yes, how much \$ \_\_\_\_\_
- Is your health insurance from the marketplace exchange? (Form 1095-A required)  YES  NO
- Did you pay any supplemental health insurance? \$ \_\_\_\_\_  YES  NO
- Did anyone receive an **Identity Protection PIN** from the IRS? (provide IRS letter)  YES  NO
- Did you have dependent care expenses in 2021? (Daycare)  YES  NO
  - If yes, please provide name, address, EIN or SS# and amount paid.
- Did you receive/pay alimony in 2021?  YES  NO
  - If yes, what is the name and social security number of the person whom you received from/paid?  
**Name:** \_\_\_\_\_ **Soc. Sec:** \_\_\_\_\_ **Amount:** \$ \_\_\_\_\_

YES NO

- Did you have large out-of-pocket medical expenses in 2021? (*Provide figures*)  YES  NO
- Did you pay any real estate taxes in 2021? (for any year) (*provide tax bills/receipts*)  YES  NO
- Did you make any cash or non-cash charitable contributions?  YES  NO
  - *Only claim contributions that can be substantiated with receipts*
- Did you make any charitable contributions directly from a retirement account? (*QCD*)  YES  NO
  - If so please provide amount. \$ \_\_\_\_\_
- Did you receive, sell, send, exchange, or otherwise acquire a financial interest in any virtual currency? (*Cryptocurrency*)  YES  NO

➤ **Education:**

- Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? **If yes, attach any Form(s) 1098-T and receipts for qualified tuition and related expenses**  YES  NO
- Did you make any withdrawals from an education savings or 529 Plan account? (*1099-Q*)  YES  NO
- Did you make any contributions to an education savings or 529 Plan account?  YES  NO
  - If yes, please provide us with the amounts.
- Did you pay any student loan interest in 2021? (*provide 1098-E from lender*)  YES  NO

➤ **State:**

- Did you pay any rent for living quarters in 2021?  YES  NO
  - If yes, please provide total: \$ \_\_\_\_\_
  - Was heat included in your rent?  YES  NO
- Did you make any purchases (by telephone, internet, mail, or in person) which the seller did not collect sales tax?  YES  NO
  - If yes, provide total of purchases: \$ \_\_\_\_\_ x 5%= \_\_\_\_\_ (*we will do calculation*)

➤ **Taxes & Direct Deposit:**

- Did you pay **Estimated Tax Payments**?  YES  NO
  - If yes, amounts paid, and dates of payments are required.
- Do you have any foreign bank accounts?  YES  NO
- Do you want your refund directly deposited?  YES  NO
- Do you want to pay your balance due electronically?  YES  NO

**If you answered yes to either receiving your refund or paying amount due electronically, please provide voided check or fill out information below.**

Routing Number	Account Number	Name of Bank	Checking or Savings	Date of Payment (if applicable)
_____	_____	_____	_____	_____