



# 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:

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

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

Filing Status: \_\_\_\_\_

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

- |   | YES                      | NO                       |
|---|--------------------------|--------------------------|
| <input type="checkbox"/> Did you have large out-of-pocket medical expenses in 2021? ( <i>Provide figures</i> )  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Did you pay any real estate taxes in 2021? (for any year) ( <i>provide tax bills/receipts</i> )  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Did you make any cash or non-cash charitable contributions?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> <i>Only claim contributions that can be substantiated with receipts</i>  |                          |                          |
| <input type="checkbox"/> Did you make any charitable contributions directly from a retirement account? ( <i>QCD</i> )   | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> If so please provide amount. \$ <u>Enter amount</u>  |                          |                          |
| <input type="checkbox"/> Did you receive, sell, send, exchange, or otherwise acquire a financial interest in any virtual currency? ( <i>Cryptocurrency</i> )  | <input type="checkbox"/> | <input type="checkbox"/> |
| <br>  |                          |                          |
| <b>➤ Education:</b>   |                          |                          |
| <input type="checkbox"/> Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? <b>If yes, attach any Form(s) 1098-T and receipts for qualified tuition and related expenses</b> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Did you make any withdrawals from an education savings or 529 Plan account? ( <i>1099-Q</i> )  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Did you make any contributions to an education savings or 529 Plan account?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> If yes, please provide us with the amounts.  |                          |                          |
| <input type="checkbox"/> Did you pay any student loan interest in 2021? ( <i>provide 1098-E from lender</i> )   | <input type="checkbox"/> | <input type="checkbox"/> |
| <br>  |                          |                          |
| <b>➤ State:</b>   |                          |                          |
| <input type="checkbox"/> Did you pay any rent for living quarters in 2021?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> If yes, please provide total: \$ <u>Enter amount paid</u>  |                          |                          |
| <input type="checkbox"/> Was heat included in your rent?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Did you make any purchases (by telephone, internet, mail, or in person) which the seller did not collect sales tax?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> If yes, provide total of purchases: \$ <u>Enter amount</u> x 5%= _____ ( <i>we will do calculation</i> )   |                          |                          |
| <br>  |                          |                          |
| <b>➤ Taxes &amp; Direct Deposit:</b>  |                          |                          |
| <input type="checkbox"/> Did you pay <b>Estimated Tax Payments</b> ?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> If yes, amounts paid, and dates of payments are required.  |                          |                          |
| <input type="checkbox"/> Do you have any foreign bank accounts?   | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Do you want your refund directly deposited?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Do you want to pay your balance due electronically?  | <input type="checkbox"/> | <input type="checkbox"/> |

**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)