



## REQUIRED TAX QUESTIONS

CLIENT NAME: \_\_\_\_\_

	PLEASE CHECKMARK BOX IN RESPONSE TO THE QUESTIONS ASKED	YES	NO															
<b>1.</b>	Is your bank account information the same as last year?	<input type="checkbox"/>	<input type="checkbox"/>															
If not, please provide your new routing and account number:  BANK NAME: _____ ROUTING NUMBER: _____ ACCOUNT #: _____																		
<b>2.</b>	Did you make all 4 estimate payments this past year?	<input type="checkbox"/>	<input type="checkbox"/>															
If yes, please list dates and amounts of each payment: <table border="1" style="width: 100%; margin-top: 10px; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">QUARTER</th> <th style="width: 30%;">DATE</th> <th style="width: 40%;">PAYMENT</th> </tr> </thead> <tbody> <tr> <td>1ST QUARTER</td> <td style="text-align: center;">___/___/___</td> <td style="text-align: center;">\$ _____.____</td> </tr> <tr> <td>2ND QUARTER</td> <td style="text-align: center;">___/___/___</td> <td style="text-align: center;">\$ _____.____</td> </tr> <tr> <td>3RD QUARTER</td> <td style="text-align: center;">___/___/___</td> <td style="text-align: center;">\$ _____.____</td> </tr> <tr> <td>4TH QUARTER</td> <td style="text-align: center;">___/___/___</td> <td style="text-align: center;">\$ _____.____</td> </tr> </tbody> </table>				QUARTER	DATE	PAYMENT	1ST QUARTER	___/___/___	\$ _____.____	2ND QUARTER	___/___/___	\$ _____.____	3RD QUARTER	___/___/___	\$ _____.____	4TH QUARTER	___/___/___	\$ _____.____
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4TH QUARTER	___/___/___	\$ _____.____																
<b>3.</b>	Have you had a change of filing status from last year?	<input type="checkbox"/>	<input type="checkbox"/>															
If so, please let us know the date of the status event: <ul style="list-style-type: none"> <li>a. Married? _____</li> <li>b. Divorced? _____</li> <li>c. Widowed? _____ Deceased Date: _____</li> </ul>																		



	<b>PLEASE CHECKMARK BOX IN RESPONSE TO THE QUESTIONS ASKED</b>	<b>YES</b>	<b>NO</b>
<b>4.</b>	Have you had any new children this past year?		
	Please list full name including middle:  a. Child's Name: _____ b. Birth date: _____		
<b>5.</b>	Any child care expenses? If so, we need documentation?		
<b>6.</b>	Have you purchased any "real" property this year? If so, we will need purchase documents and closing statements.		
<b>7.</b>	Have you sold any "real" property? If so, we will need the original purchase documents and the selling documents.		
<b>8.</b>	Have you purchased any vehicles or equipment for your business? If so, we will need purchase documents.		
<b>9.</b>	Did you make or take an HSA Contribution/Distribution? If so, we will need Form 1099-sa and Form 5498-SA.		
<b>10.</b>	Did you have Obama Care Insurance? If so, we need Form 1095A.		
<b>11.</b>	Did you have any out of state income? If so, we will need a copy of your driver's license?		
<b>12.</b>	Did you have any foreign accounts?		
<b>13.</b>	Do you have any crypto currency?		
<b>14.</b>	How much did you receive for the third Economic Stimulus Payment? (\$1400 per person in 2021) If so, we will need Form 1444-C.		
<b>15.</b>	Did you make any contributions to a retirement plan?		
<b>16.</b>	Did you take any retirement money out in 2020 due to covid?		
<b>17.</b>	Did you establish a business retirement plan in 2021?		
<b>18.</b>	Did you or any employee miss time off work due to covid?		
<b>19.</b>	Did you receive advanced child tax credits? If so, please provide us the letter 6419 you received from the IRS to report on your return.		
<b>20.</b>	Did you have charitable donations of at least \$300 (single or married filing separate) or \$600 (married filing joint) for 2021? If so, we will need receipts of donations given.		