



IMPORTANT TAX QUESTIONS

1. Please confirm your and your spouse's (if applies) birthdates:

- a. Your birthdate: _____
- b. Your spouse's birthdate: _____

2. Is your bank account information the same as last year? If not, please provide your new routing and account number:

- a. BANK NAME: _____
- b. ROUTING #: _____
- c. ACCOUNT #: _____

3. Did you make all 4 estimate payments this past year? Yes? No? (Please circle answer)

- a. If yes, please list dates and amounts of each payment:

QUARTER	DATE	PAYMENT
1 st Quarter	___/___/___	\$_____.____
2 nd Quarter	___/___/___	\$_____.____
3 rd Quarter	___/___/___	\$_____.____
4 th Quarter	___/___/___	\$_____.____

4. Have you had a change of filing status from last year?

- a. Married?
- b. Divorced?
- c. Widowed? Deceased Date: _____

5. Have you had any new children this past year? (Please list full name including middle)

- a. Child's Name: _____
- b. Birth date: _____
- c. Social Security Number: _____



- 6. Any child care expenses? If so, we will need documentation.
 - a. Expenses: _____
 - b. Total Expenses: _____
 - c. Provider Name: _____
- 7. Have you purchased any "real" property this year? If so, we will need purchase documents and closing statements.
 - a. Purchased: _____
- 8. Have you sold any "real" property? If so, we will need the original purchase documents and the selling documents.
 - a. Sold: _____
- 9. Have you purchased any vehicles or equipment? If so, we will need purchase documents.
 - a. Purchased: _____
- 10. Did you make or take a HSA Contribution/Distribution? If so, we will need Form 1099-SA and Form 5498-SA.
- 11. Did you have Obama Care Insurance? If so, we will need Form 1095A.
- 12. Did you have any out of state income? If so, we will need to make a copy of your driver's license.
- 13. Did you have or earn any income in a foreign country? Yes? No? (Please circle answer)
- 14. Do you have any crypto currency? Yes? No? (Please circle answer)
- 15. How much did you receive in Stimulus Payment?
 - a. First Stimulus (IRS Sent Mid-2020): _____
 - b. Second Stimulus (IRS Sent Early-2021): _____
- 16. Did you make any contributions to a retirement plan? Yes? No? (Please circle answer)
 - a. If so, how much? _____
- 17. Did you make at least \$300 of charitable contributions to a qualifying public charity? Yes? No?
 - a. If yes, we will need receipts corresponding with the chart below.

PUBLIC CHARITY	DONATION DATE	AMOUNT
	___/___/___	\$_____.
	___/___/___	\$_____.
	___/___/___	\$_____.
	___/___/___	\$_____.