

Returning Clients ONLY *Do Not Write Same Below Please Give Detail*

Name(s) _____

Address: _____

E-Mail Address: _____

Phone # : _____

Bank Account Information

Do you want Direct Deposit? No Yes: **Do Not Write SAME Below**

Bank Name: _____ Checking

Routing Number: _____ Savings

Account Number: _____

Changes during tax year 2021

Marital changes?	<input type="checkbox"/> No <input type="checkbox"/> Yes: Married on _____ *New spouse ID & SS card required Widowed on _____ Divorced on _____ Separated on _____
Any Change to dependents?	<input type="checkbox"/> No <input type="checkbox"/> Yes: *New dependent SS card required Full Name _____ DOB _____ SS# _____ # Months in 2021 lived with taxpayer _____

Other Questions

Who got the PFD?	<input type="checkbox"/> All <input type="checkbox"/> Some of us: _____ <input type="checkbox"/> NO <input type="checkbox"/> Garnished
Rcv'd Health Insurance Through Market Place?	<input type="checkbox"/> No <input type="checkbox"/> Yes: * Need Form 1095-A
Rcv'd unemployment?	<input type="checkbox"/> No <input type="checkbox"/> Yes: * Need 1099-G
Paid tuition/fees?	<input type="checkbox"/> No <input type="checkbox"/> Yes: * Need 1098-T
Paid student loans?	<input type="checkbox"/> No <input type="checkbox"/> Yes: * Need 1098-E
Bought,sold, refinance prop?	<input type="checkbox"/> No <input type="checkbox"/> Yes * Need Final HUD-1/Closing Doc

At any time during 2021 did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency ? Example Bitcoin	<input type="checkbox"/> No <input type="checkbox"/> Yes
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During 2021 did you give cash charitable contributions?	<input type="checkbox"/> No <input type="checkbox"/> Yes How Much?
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During 2021 did you have any of following : Rent your personal car, drive your car to transport people or food?	<input type="checkbox"/> No <input type="checkbox"/> Yes
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During 2021 did you do any stock trading? Ex Robinhood, Acorn	<input type="checkbox"/> No <input type="checkbox"/> Yes
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NOTES TO TAX PREPARER:

I authorize the above information to be used for the preparation of my income tax return.

Taxpayer: _____ **Date:** _____

Spouse: _____ **Date:** _____