This Tax Organizer is designed to help you gather the information needed to prepare your 2021 personal income tax return.

Completion of the Questionnaire is mandatory in order for us to begin working on your return.
Answer all questions and attach a statement, when necessary, for additional information.

The Tax Organizer worksheets following the Questionnaire are provided as a tool, and completion is not mandatory. However, please review sections "Personal Information" and "Direct Deposit/Electronic Funds Withdrawal Information", and note any changes.

You will also need to provide the following information, as applicable:

- **Forms W-2 for wages, salaries and tips.**
- **All Forms 1099 for interest, dividends, retirement, miscellaneous income, nonemployee compensation, Social Security, state or local refunds, gambling winnings, unemployment compensation, etc.**
- **Brokerage statements showing investment transactions for stocks, bonds, virtual currencies, etc.**
- **Schedule K-1 from partnerships, S corporations, estates and trusts.**
- **Statements supporting educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q.**
- **All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit.**
- **All Forms 1099-QA and/or 5498-QA related to ABLE (Achieving a Better Life Experience) account.**
- **All Forms 1099-H reltaed to Health Coverage Tax Credit (HCTC) advance payments.**
- **Statements supporting deductions for mortgage interest (Forms 1098), taxes, and charitable contributions (including any Form 1098-C).**
- **Notice 1444-C and Letter 6475, Your 2021 Economic Impact Payment, showing the amount of the Economic Impact Payment (EIP3) you received. **Also known as Stimulus Payment***
- **Letter 6419 showing advanced Child Tax Credit (CTC) payments you received in July, August, September, October, November, and December.**
- **Notice CP-21 or CP-22 showing an adjustment to your refund (or balance due), for an IRS adjustment to your 2020 tax return, for the exclusion of unemployment compensation and/or Advance Premium Tax Credit as a result of the American Rescue Plan Act (ARPA).**
- **Copies of closing statements regarding the sale or purchase of real property.**
- **Legal documents for adoption, divorce, or separation involving custody of your dependent children (if not provided to our office previously).**
- **Any tax notices sent to you by the IRS or other taxing authority (if not provided to our office previously).**
- **A copy of your income tax return from last year, if not prepared by this office.**

If you are delivering hard copy documents to our office, please do not include staples, paper clips, or unopened envelopes.

Due to continued IRS delays in processing tax returns, our office will automatically file an extension on your behalf. *See "How do extensions work?" in FAQs section.*

FYI: The IRS doesn't ***initiate*** contact with taxpayers by email, text messages or social media channels to request personal or financial information. This includes requests for PIN numbers, passwords or similar access information for credit cards, banks or other financial accounts. Phishing is a scam typically carried out through unsolicited email and/or websites that pose as legitimate sites and lure unsuspecting victims to provide personal and financial information. If you receive such an email from what appears to be the IRS, send a copy of the email to phishing@irs.gov. Please do not respond to the email unless the email request you send to the IRS has been verified as legitimate. You may also contact our office regarding any correspondence, written or electronic, that you receive from the IRS.

Thank you for the opportunity to serve you.

Sincerely,

Sincerely,

Rochelle Chandler, CPA
Founding Partner

FAQs - Frequently Asked Questions

What do I need to provide to you for my taxes to be prepared? We need all of your supporting documents, the completed Questionnaire, and the completed Due Diligence Questions, if applicable. See "What are the Due Diligence Questions?" below.

What are the Due Diligence Questions? IRS regulations require that we, as your tax preparer, satisfy due diligence requirements regarding certain credits and/or tax filing statuses. If the Due Diligence section of questions is included with your Questionnaire, this likely applies to you. Include your completed Due Diligence questions with your tax information.

I completed the Questionnaire last year. Do I really need to complete it again?
Yes. There are changes to tax law every year, and each year's Questionnaire captures those tax law changes. Additionally, the Questionnaire is designed to ensure you're taking advantage of all allowable tax deductions and/or credits!

How do I get my documents to you?

1. Send via the Client Portal: https://www.ChandlerKnowlesCPA.com/clients/client-secure-document-portal-2/
2. Drop them off at our office. Should you arrive after hours, you can place them in the locked drop box next to our front door. *Please do not include staples, paper clips, or unopened envelopes.*

I delivered my documents to your office. How are my documents returned to me? Due to security concerns, you will need to pick up any hard copies delivered to our office within 3 weeks of your tax return being filed. Any documents that have not been picked up from our office within 3 weeks will be shredded. *Note that all documents used for tax preparation are available to you via the Portal.*

I have moved. Can you still do my taxes? Yes! We have many clients outside of the DFW area and out of state. We can prepare your federal tax return and any state returns that may be necessary. Important: Make sure you change your address with the IRS by submitting IRS Form 8822, available via irs.gov.

I am waiting on a K-1 from a business or trust that has its return prepared by someone else. Should I wait until I receive it before providing the rest of my documents to you? No, if you have everything else, please forward your information to us and include a note that you are waiting on a K-1.

How long does it take to prepare my taxes? We prepare tax returns on a first-in, first-out basis and time varies since every tax return is different. We do not begin the preparation of the tax return until all of your documents AND the completed Questionnaire are received.

I started a new business or rental activity this year. What do I need to provide?
Contact your tax preparer for a list of items needed.

How will I know when my tax preparer has questions? You will hear from your tax preparer during preparation. Once your tax return is ready, you will receive an email with instructions regarding reviewing your tax return, and the remaining steps to file your return. It is very important that we have your current email address to facilitate these communications.

How will I know when my tax return has been e-filed? You will receive an email when your return has been accepted by the IRS. Please be sure to add **efile@efileservices.net** to your Safe Senders list in order to receive this acceptance email.

How can I check on the status of my refund? After you receive the acceptance email, visit [www.irs.gov.](http://www.irs.gov)

When will my package be ready for pick-up? If you delivered hard copy documents to our office, your package will be ready for pickup 2-3 business days after you receive the e-mail confirmation that your return has been accepted.

What if I need to file an extension? Due to continued IRS delays in processing tax returns, our office will automatically file an extension on your behalf. See **"How do extensions work?"** below.

How do extensions work? An extension gives you more time to file your tax return, *but not more time to pay your tax*. If your return is filed after the April 15th deadline and you owe tax, and payment isn't made by April 15th with the extension, the IRS will assess late payment penalties. If you need our help with this calculation, submit your tax documents along with notes on the information you might still be waiting on as soon as possible.

CHANDLER & KNOWLES
CPAs, PLLC

Privacy Policy

Like all providers of personal financial services, tax professionals are required by law to inform clients of their policies regarding privacy of client information. Our firm continues to adhere to professional standards of confidentiality that are even more stringent than those required by law. We have always protected the security and privacy of your personal and financial information.

Types of Nonpublic Personal Information We Collect

The only nonpublic personal information we collect is provided to us by you or obtained with your authorization.

Parties to Whom We Disclose Information

We do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures may include providing information to our employees, or, in limited situations, to unrelated third parties who need that information to assist us in serving you. In all situations, we stress the confidential nature of the information being shared.

Protecting the Confidentiality and Security of Clients' Information

We retain records relating to our professional services to better serve your professional needs and, in some cases, to comply with professional guidelines. In order to protect your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Chandler & Knowles CPAs
Questionnaire

PREFERRED CONTACT NAME: ______________________________

BEST EMAIL ADDRESS: ______________________________

BEST PHONE NUMBER: ______________________________

Please check the appropriate box and include all necessary details and documentation.

	Yes	No
Personal Information		
Did your marital status change during the year?	☐	☐
If yes, explain:		
Did you live separately from your spouse during the last six months of the year?	☐	☐

If you were newly married in 2021, provide the following **for your Spouse**:

Legal Name ______________________________

Social Security Number ____________________ Date of Birth

	Yes	No
Did your address change from last year? If yes, please provide current address:	☐	☐

____

Important: You must notify the IRS of your address change by submitting Form 8822. The form is available via irs.gov.

	Yes	No
Can you be claimed as a dependent by another taxpayer?	☐	☐
Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account numbers change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? If yes, note your new banking information on the tax organizer, or provide a copy of a canceled check. *Do not send your banking information via email. The most secure way to provide sensitive information is via the portal.*	☐	☐
Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, include the IRS letter.	☐	☐
Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires.	☐	☐

COVID-19 Information

	Yes	No
Did you receive an Economic Impact Payment (EIP3), also known as Stimulus Payment? If yes, include Notice 1444-C and IRS Letter 6475.	☐	☐

Did you receive an adjustment to your refund (or balance due) for an IRS adjustment to your 2020 tax return, for the exclusion of unemployment compensation and/or Advanced Premium Tax Credit as a result of the American Rescue Plan Act (ARPA)? If yes, include Notice CP-21 or CP-22. ☐ ☐

Did you receive Advanced Child Tax Credit (CTC) payments in July, August, September, October, November, and December? If yes, include Letter(s) 6419. ☐ ☐

See "IMPORTANT: ADVANCED CHILD TAX CREDIT AND IRS LETTER 6419" at the end of this Questionnaire.

Are you a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state? ☐ ☐

Did you receive emergency leave sick pay? ☐ ☐

Did you receive emergency family leave wages? ☐ ☐

Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year? ☐ ☐

If you are self-employed, Did you receive an Economic Injury Disaster Loan (EIDL) for your Schedule C Business in 2021?
If yes: Amount Received in 2021 $____________________ ☐ ☐

If you are self-employed, did you receive a Paycheck Protection Program (PPP) loan for your Schedule C Business in 2021?
If yes: Amount Received in 2021 $____________________ ☐ ☐

If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness?
If yes: Amount Forgiven $____________________ ☐ ☐

If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you needed? ☐ ☐

If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to your son or daughter under the age of 18? ☐ ☐

If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care provided to another? ☐ ☐

Dependent Information

Were there any changes in dependents from the prior year?
If yes, explain: ____ ☐ ☐

Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of $2,200? ☐ ☐

If you have dependents who must file a tax return, do you need our assistance? ☐ ☐

Did you provide over half the support for any other person(s) other than your dependent children during the year? ☐ ☐

Did you pay for child care while you worked, looked for work, or while a full-time student? ☐ ☐

Did you pay any expenses related to the adoption of a child during the year? ☐ ☐

If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? ☐ ☐

Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft? If yes, include the IRS letter. ☐ ☐

Purchases, Sales, Business, and Debt Information

Did you start a new business or purchase rental property during the year?
If yes, do not provide receipts, for either income or expenses, to our office.
Contact your tax preparer for a list of additional information required. ☐ ☐

Did you sell, exchange, or purchase any assets used in your trade or business? ☐ ☐

Did you acquire a new or additional interest in a partnership or S corporation?	☐	☐
Did you sell, exchange, or purchase any real estate during the year? If yes, include the Closing Disclosure.	☐	☐
Did you purchase or sell a principal residence during the year? If yes, include the Closing Disclosure.	☐	☐
Did you foreclose or abandon a principal residence or real property during the year?	☐	☐
Did you acquire or dispose of any stock during the year?	☐	☐
Did you take out a home equity loan this year?	☐	☐
Did you refinance a principal residence or second home this year? If yes, please include the Closing Disclosure.	☐	☐
Did you sell an existing business, rental, or other property this year?	☐	☐
Did you lend money personally with the understanding of repayment and this year it became totally uncollectable?	☐	☐
Did you have any debts canceled or forgiven this year, such as a home mortgage, student loan(s), credit card, or personal loan?	☐	☐
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? If yes, include the receipt.	☐	☐

Income Information

Did you have any foreign income?	☐	☐
Did you have any interest or dividend income? If yes, include Form(s) 1099.	☐	☐
Did you receive any income from property sold prior to this year? If yes, explain: ______________________________	☐	☐
Did you receive any unemployment benefits during the year? If yes, include Form 1099-G.	☐	☐
Did you receive any disability income during the year?	☐	☐
Did you receive any Medicaid waiver payments as difficulty of care during the year?	☐	☐
Did you receive tip income not reported to your employer this year?	☐	☐
Did any of your life insurance policies mature, or did you surrender any policies?	☐	☐
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	☐	☐
Did you receive any income considered to be nonemployee compensation?	☐	☐
Do you expect a large fluctuation in income, deductions, or withholding next year?	☐	☐
At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency (including from an airdrop or a hard fork), or did you use virtual currencies to pay for goods or services?	☐	☐

Retirement Information

Are you an active participant in a pension or retirement plan?	☐	☐
Did you receive any Social Security benefits during the year? If yes, include Form SSA.	☐	☐
Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, include Form(s) 1099-R.	☐	☐
If yes, were any withdrawals due to a Federally declared disaster?	☐	☐
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2021?	☐	☐
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan? If yes, include Form(s) 1099-R.	☐	☐
Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, include Form(s) 5498.	☐	☐

Education Information

Did you, your spouse, or your dependents attend a post-secondary school during the year? ☐ ☐

Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, include any Form(s) 1098-T and receipts for qualified tuition and related expenses. ☐ ☐

Did anyone in your family receive a scholarship of any kind during the year? ☐ ☐

If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board? ☐ ☐

Did you make any withdrawals from an education savings or 529 Plan account? If yes, include Form(s) 1099-Q. ☐ ☐

If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account? ☐ ☐

Did you pay any student loan interest this year? If yes, include Form(s) 1098-E. ☐ ☐

Did you cash any Series EE or I U.S. Savings bonds issued after 1989? ☐ ☐

Health Care Information

Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e., Medicare/Medicaid) for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent. ☐ ☐

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, attach any Form(s) 1095-A you received. ☐ ☐

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family? ☐ ☐

Did you make any contributions to a Health savings account (HSA) or Archer MSA? *Note: an HSA is different from a flex spending account/cafeteria plan.* If yes, include Form(s) 5498-SA. ☐ ☐

Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year? If yes, include Form 1099-SA. ☐ ☐

Did you pay long-term care premiums for yourself or your family? ☐ ☐

Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? If yes, include Form(s) 5498-QA. ☐ ☐

Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, include Form(s) 1099-QA. ☐ ☐

If you are a self-employed business owner, did you pay health insurance premiums for your employees this year? ☐ ☐

Did you receive any Health Coverage Tax Credit (HCTC) advance payments? If yes, include Form(s) 1099-H. ☐ ☐

Itemized Deduction Information

Did you incur a casualty or theft loss or any condemnation awards during the year? ☐ ☐

If yes, did the loss occur in a Federally declared disaster area? ☐ ☐

Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)? If yes, provide expenses in total by category. *Do not provide receipts to our office.* ☐ ☐

Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? If yes, provide evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made. ☐ ☐

Did you donate a vehicle or boat during the year? If yes, include Form 1098-C or other written acknowledgment from the donee organization. ☐ ☐

Did you pay real estate taxes for your primary home and/or second home? ☐ ☐

Did you pay any mortgage interest on an existing home loan? If yes, include Form(s) 1098.	☐	☐
Did you incur interest expenses associated with any investment accounts you held?	☐	☐
Did you make any major purchases during the year (cars, boats, etc.)? If yes, include receipts.	☐	☐

Miscellaneous Information

Did you make gifts of more than $15,000 to any individual?	☐	☐
Did you utilize an area of your home for business purposes?	☐	☐
Did you engage in any bartering transactions?	☐	☐
Did you retire or change jobs this year?	☐	☐
Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?	☐	☐
Did you pay any individual as a household employee during the year?	☐	☐
Did you make energy efficient improvements to your main home this year? If yes, include receipts.	☐	☐
Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?	☐	☐
Did you have signature authority over any foreign financial accounts, have foreign assets, or hold interest in a foreign entity?	☐	☐
Did you receive correspondence from any State or the IRS that has not already been provided? If yes, explain: ______________________________	☐	☐
Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?	☐	☐
Do you wish to designate $3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.	☐	☐
If you are due a refund, would you like to have it applied to next year's taxes?	☐	☐
If no, would you prefer to have it direct deposited into your bank account?	☐	☐
If you have tax due, would you prefer to have it automatically withdrawn from your bank account?	☐	☐
Did you make any 2021 estimated tax payments?	☐	☐

If yes, please provide the amount and date of each payment made.
For your reference, the due date for each 2021 estimated tax payment is provided below:

	Due Date	Amount Paid	Date Paid
Q1 ES:	06/15/2021	____________	____________
Q2 ES:	06/15/2021	____________	____________
Q3 ES:	09/15/2021	____________	____________
Q4 ES:	01/18/2022	____________	____________

Continued on next page . . . . .

IMPORTANT: ADVANCED CHILD TAX CREDIT AND IRS LETTER 6419

If you received the Advanced Child Tax Credit in 2021, IRS Letter 6419 may contain incorrect or incomplete information. If the advanced child tax credit amounts issued by the IRS don't match what's reported on the tax return, the IRS may delay processing the return. Therefore, taxpayers should not rely solely on IRS Letter 6419 when reporting the amount of advanced child tax credit on their tax return.

Per the IRS: "We encourage taxpayers to thoroughly check their records before filing their taxes. For any recipient who doesn't receive their letter or is unsure of the amount they received in 2021, there are options to help. The IRS encourages people to check their Online Account on IRS.gov beginning January 31.

For taxpayers who are married filing jointly, as indicated on IRS Letter 6419, they are being sent to individual taxpayers. Therefore, married taxpayers will each receive a letter, and they will need to combine the information from the letters when they file their joint return."

What this means for you:

- We need all Form(s) 6419 both you and your spouse (if applicable) received, even if the figures on the forms are incorrect.

- Ensure the correct amount is reported on your return:

1. Check your records (i.e., bank statements) for the advanced child tax credit payments you actually received. If the total received does not match Form(s) 6419, note the total amount received here: $________________

OR

2. Check your Online Account on IRS.gov beginning January 31. Note that this can be an arduous process, so have ample time available. If the total amount on your Online Account does not match Form(s) 6419, note the total amount here: $________________

DUE DILIGENCE QUESTIONS

Dear Client:

IRS regulations require paid tax preparers to perform a series of due diligence requirements for certain credits and/or filing statuses. **We believe you are/may be eligible for one or more of the credits or the filing status**. In order to comply with these requirements, we ask all clients for whom returns are prepared to answer the following due diligence questions. Please respond to the questions below by entering Y (yes) or N (no) where indicated.

Earned Income Credit - *Y or N*
Were you (taxpayer(s)) a US citizen or resident alien for all of 2021?____

Are dependent(s) claimed on your tax return your: son, daughter, stepchild, foster child, or a descendant of any of them (for example, your grandchild), or brother, sister, half-brother, half-sister, stepbrother, stepsister, or a descendant of any of them (for example, your niece or nephew)? ____

Did any dependent(s) file a joint return with another person for 2021? ____

Did dependent(s) live with you in the United States for more than half of 2021? ____
*You can't claim the EIC for a child who didn't live with you for more than half of the year, even if you paid most of the child's living expenses.

Do you believe dependent(s) could also meet the qualifications to be a qualifying child of another tax filer? ____
*Sometimes a child meets the tests to be a qualifying child of more than one person. However, only one of these persons can actually treat the child as a qualifying child. Only that person can use the child as a qualifying child.

Child Tax Credit - *Y or N*
Are dependent(s) claimed on your tax return your: son, daughter, stepchild, foster child, brother, sister, stepbrother, stepsister, half-brother, half-sister, or a descendant of any of them (for example, your grandchild, niece, or nephew)? ____

Did any dependent(s) provide over half of his or her own support for 2021? ____

Did all dependent(s) live with you for more than half of 2021? ____

Did any dependent(s) file a joint return with another person for 2021? ____

Are all dependent(s) a U.S. citizen, a U.S. national, or a U.S. resident alien? ____ If yes:

*We are required to obtain from the taxpayer a document proving the existence of the child such as one of the following (**that would have the child's name on it**). Please upload:
- School record or statement
- Health care provider statement
- Child care provider record
- Place of worship statement

American Opportunity Tax Credit- *Y or N*
1. As of the beginning of 2021, has the student completed the first 4 years of postsecondary education (generally, the freshman through senior years of college), as determined by the eligible educational institution? ____

If our office has prepared your tax returns for each of the last four years, you may skip to Question #3. If not, please answer:

2. For the student, has either the American Opportunity Tax credit or the Hope Scholarship credit been claimed by you or anyone else for this student for any 4 tax years before 2021? ____
*If the American Opportunity Tax credit (and Hope Scholarship credit) has been claimed for this student for any 3 or fewer tax years before 2021, this requirement is met.

3. For at least one academic period beginning (or treated as beginning) in 2021, has the student met both of the following? ____
(a) Was enrolled in a program that leads to a degree, certificate, or other recognized educational credential; and
(b) Carried at least one-half the normal full-time workload for his or her course of study, for at least one semester.

4. As of the end of 2021, has the student been convicted of a federal or state felony for possessing or distributing a controlled substance? ____

Head of Household Filing Status - *Y or N*
Are you, the taxpayer, unmarried on 12/31/2021 and do you provide more than half of the cost of keeping up a home for the year for a qualifying person (i.e., dependent)? ____

General - *Y or N*
Can you provide documentation to substantiate the above answers? ____

Have you ever had any of these credits disallowed or reduced in the past? ____

Sincerely,

Chandler & Knowles CPAs, PLLC

Completed By: ____________________________________

Date: _______________________

General: 1040

Personal Information

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er)) ___

Mark if you were married but living apart all year ___ Mark if your nonresident alien spouse does not have an ITIN ___

	Taxpayer	Spouse
Social security number		
First name		
Last name		
Occupation		
Designate $3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3=Blank)		
Mark if legally blind		
Mark if dependent of another taxpayer		
Taxpayer between 19 and 23, full-time student, with income less than 1/2 support? (Y, N)		
Date of birth		
Date of death		
Work/daytime telephone number/ext number		
Do you authorize us to discuss your return with the IRS (Y, N)		

General: 1040, Contact

Present Mailing Address

Address

Apartment number

City/State postal code/Zip code

Foreign country name

Foreign phone number

Home/evening telephone number

Taxpayer email address

Spouse email address

General: 1040

Dependent Information

First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months in home	Care expenses paid for dependent

Credits: 2441

Child and Dependent Care Expenses

Provider information:

Business name

First and Last name

Street address

City, state, and zip code

Social security number OR Employer identification number

Tax Exempt or Living Abroad Foreign Care Provider (1 = TE, 2 = LAFCP)

Amount paid to care provider in 2021

	Taxpayer	Spouse
Employer-provided dependent care benefits that were forfeited		

Credits: AdvCTC

Advanced Child Tax Payments

Advanced Child Tax Payments received (Letter 6419):	Taxpayer	Spouse
July		
August		
September		
October		
November		
December		

General: Bank

Direct Deposit/Electronic Funds Withdrawal Information

Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number , and type of account below. If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter information in the fields below. Note that electronic funds will be withdrawn only from the primary account listed below.

Mark to verify all accounts listed below have been reviewed, updated as needed, and are correct. _

Primary account:

Financial institution routing transit number ______________

Name of financial institution ______________

Your account number ______________

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) _

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) _

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) _

Enter the maximum dollar amount, or percentage of total refund Dollar ______________ **or** Percent (xxx.xx) __________

Secondary account #1:

Financial institution routing transit number ______________

Name of financial institution ______________

Your account number ______________

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) _

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) _

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) _

Enter the maximum dollar amount, or percentage of total refund Dollar ______________ **or** Percent (xxx.xx) __________

Secondary account #2:

Financial institution routing transit number ______________

Name of financial institution ______________

Your account number ______________

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) _

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) _

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) _

Enter the maximum dollar amount, or percentage of total refund Dollar ______________ **or** Percent (xxx.xx) __________

*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

Electronic Filing: ID Auth

Identity Authentication

Taxpayer -

Form of identification (1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) ___

Identification number ______________

Issue date ______________

Expiration date ______________

Location of issuance ___

Document number (New York only) ______________

Spouse -

Form of identification (1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) ___

Identification number ______________

Issue date ______________

Expiration date ______________

Location of issuance ___

Document number (New York only) ______________

NOTES/QUESTIONS:

Credits: Rebate

Economic Impact Payment (EIP)/Stimulus Payment

Please provide all copies of Notice 1444-C that you receive.
Look up your EIP3 amount by creating or viewing your IRS online account at https://www.irs.gov/payments/view-your-tax-account

	Taxpayer	Spouse
Economic impact payment(s) 3 (EIP3) received	____	____
Mark if taxpayer or spouse, if married, was member of US Armed Forces in 2021		___

Income: W2

Salary and Wages

Please provide all copies of Form W-2 that you receive.
Below is a list of the Form(s) W-2 as reported in last year's tax return. If a particular W-2 no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	___	___	___
___	___	___	___
___	___	___	___
___	___	___	___
___	___	___	___

Retirement: 1099R

Pension, IRA, and Annuity Distributions

Please provide all copies of Form 1099-R that you receive.
Below is a list of the Form(s) 1099-R as reported in last year's tax return. If a particular 1099-R no longer applies, mark the not applicable b

T/S	Description	Prior Year Information	Mark if no longer applicable
___	___	___	___
___	___	___	___
___	___	___	___
___	___	___	___

Income: K1, K1T

Schedules K-1

Please provide all copies of Schedule K-1 that you receive.
Below is a list of the Schedule(s) K-1 as reported in last year's tax return. If a particular K-1 no longer applies, mark the not applicable box

T/S/J	Description	Form	Mark if no longer applicable
___	___	___	___
___	___	___	___
___	___	___	___
___	___	___	___

Income: W2G

Gambling Income

Please provide all copies of Form W-2G that you receive.
Below is a list of the Form(s) W-2G as reported in last year's tax return. If a particular W-2G no longer applies, mark the not applicable bo

T/S	Description	Prior Year Information	Mark if no longer applicable
___	___	___	___
___	___	___	___

Educate: 1099Q

Qualified Education Plan Distributions

Please provide all copies of Form 1099-Q that you receive.
Below is a list of the Form(s) 1099-Q as reported in last year's tax return. If a particular 1099-Q no longer applies, mark the not applicable b

T/S	Description	Prior Year Information	Mark if no longer applicable
___	___	___	___
___	___	___	___

Income: B1

Interest Income

Please provide all copies of Form 1099-INT or other statements reporting interest income.

T/S/J	Payer Name	Interest Income	Prior Year Information

Income: B3

Seller Financed Mortgage Interest

T, S, J ___ Payer's name ________ Payer's social security number ________

Payer's address, city, state, zip code ________

Amount received in 2021 ________ Amount received in 2020 ________

Income: B2

Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

T/S/J	Payer Name	Ordinary Dividends	Qualified Dividends	Prior Year Information

Income: D

Sales of Stocks, Securities, and Other Investment Property

Please provide copies of all Forms 1099-B and 1099-S.

T/S/J	Description of Property	Date Acquired	Date Sold	Gross Sales Price (Less expenses of sale)	Cost or Other Basis

Income: Income

Other Income

Please provide copies of all supporting documentation.

	2021 Information	Prior Year Information
State and local income tax refunds		

	T/S	Agreement Date	2021 Information	Prior Year Information
Alimony received				

	Taxpayer	Spouse	Prior Year Information
Unemployment compensation			
Unemployment compensation repaid			
Social security benefits			
Medicare premiums to be reported on Schedule A			
Railroad retirement benefits			

T/S/J	Other Income:	2021 Information	Prior Year Information

1040 Adj: IRA

Adjustments to Income - IRA Contributions

Please provide year end statements for each account and any Form 8606 not prepared by this office.

	Taxpayer	Spouse
Traditional IRA Contributions for 2021 -		
If you want to contribute the maximum allowable traditional IRA contribution amount, enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)	___	___
Enter the total traditional IRA contributions made for use in 2021	______	______
Roth IRA Contributions for 2021 -		
Mark if you want to contribute the maximum Roth IRA contribution	___	___
Enter the total Roth IRA contributions made for use in 2021	______	______

Educate: Educate2

Higher Education Deductions and/or Credits

Complete this section if you paid interest on a qualified student loan in 2021 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

T/S	Qualified student loan interest paid	2021 Information	Prior Year Information
___	______	______	______
___	______	______	______

Complete this section if you paid qualified education expenses for higher education costs in 2021.
Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution.
Please provide all copies of Form 1098-T.

T/S	Ed Exp Code*	Student's SSN	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information
___	__	______	______	______	______	______
___	__	______	______	______	______	______
___	__	______	______	______	______	______
___	__	______	______	______	______	______

***Education Expense Code: 1 = American opportunity credit; 2 = Lifetime learning credit; 3 = Tuition and fees deduction**
The student qualifies for the American opportunity credit when enrolled at least half-time in a program leading to a degree, certificate, or recognized credential; has not completed the first 4 years of post-secondary education; has no felony drug convictions on student's record.

1040 Adj: 3903

Job Related Moving Expenses

Complete this section if you moved to a new home due to service in the armed forces.

Description of move	______
Taxpayer/Spouse/Joint (T, S, J)	___
Mark if the move was due to service in the armed forces	__
Number of miles from old home to new workplace	______
Number of miles from old home to old workplace	______
Mark if move is outside United States or its possessions	__
Transportation and storage expenses	______
Travel and lodging (not including meals)	______
Total amount reimbursed for moving expenses	______

1040 Adj: OtherAdj

Other Adjustments to Income

Alimony Paid:

T/S	Date*	Recipient name	Recipient SSN	2021 Information	Prior Year Information
___	______	______		______	______

Street address ______

City, State and Zip code ______ ___ ______

*Enter the divorce/separation agreement date

	Taxpayer	Spouse	Prior Year Information
Educator expenses:			
______	______	______	______
______	______	______	______
Other adjustments:			
______	______	______	______
______	______	______	______
______	______	______	______

Itemized: A1

Medical and Dental Expenses

T/S/J		2021 Information	Prior Year Information
__	Medical and dental expenses		
__	Medical insurance premiums you paid***		
__	Long-term care premiums you paid***		
__	Prescription medicines and drugs		
__	Miles driven for medical items		

***Do not include pre-tax amounts paid by an employer-sponsored plan, amounts paid for your self-employed business, or Medicare premiums entered on Form Lite-3

Itemized: A1

Tax Expenses

T/S/J		2021 Information	Prior Year Information
__	State/local income taxes paid		
__	2020 state and local income taxes paid in 2021		
__	Sales tax paid on actual expenses		
__	Real estate taxes paid		
__	Personal property taxes		
__	Other taxes		

Itemized: A2

Interest Expenses

T/S/J		2021 Information	Prior Year Information
__	Home mortgage interest From Form 1098		

Other home mortgage interest paid to individuals:

T/S/J	Payee's Name	SSN or EIN	2021 Information	Prior Year Information
__				

Address	City	State	Zip Code

T/S/J		2021 Information	Prior Year Information
__	Investment interest expense, other than on Sch K-1s:		

Refinancing Information:	Refinance #1	Refinance #2
T/S/J	__	__
Recipient/Lender name		
Total points paid at time of refinance		
Date of refinance		
Term of new loan (in months)		
Reported on Form 1098 in 2021		

Itemized: A3

Charitable Contributions

T/S/J		2021 Information	Prior Year Information
__	Contributions made by cash or check		
__	Volunteer miles driven		
__	Noncash items, such as: Goodwill, Salvation Army		

Itemized: A3, A-St

Miscellaneous Deductions

T/S/J		2021 Information	Prior Year Information
	Other expenses		
__			
__	Gambling losses (enter only if you have gambling income)		

*****STATE USE ONLY - Complete the following fields only if you file a state return in AL, AR, CA, HI, MN, NY or PA**

T/S/J		2021 Information	Prior Year Information
__	Unreimbursed expenses***		
__	Union dues, other than amounts reported on Form W-2***		
__	Tax preparation fees***		
	Other expenses, subject to 2% AGI limitation***:		
__			
__			
__	Safe deposit box rental***		
__	Investment expenses, other than on Schedule(s) K-1 or Form(s) 1099-DIV/INT***		

Form ID: Rebate

Recovery Rebate Credit (Economic Impact Payment)

Please provide copies of all Notice(s) 1444-C and Letter(s) 6475

A third round of stimulus payments was issued in 2021 for qualifying individuals. The third economic impact payment, referred to as EIP3, was issued in 2021 to qualifying individuals. Refer to the IRS notice or letter indicating the payment amount received. You can look up your EIP3 amount by either creating or viewing your IRS online account at **https://www.irs.gov/payments/view-your-tax-account.**

The EIP3 was an advance on a 2021 tax credit. The payments will be used to determine if you qualify for an additional recovery rebate credit on your 2021 return. The EIP3 will not increase the total amount of tax you pay but may reduce the amount owed or increase a tax refund.

	Taxpayer/Joint	Spouse
Economic impact payment (EIP). Enter a zero (0) if none was received:		
EIP no. 3 reported on Notice 1444-C	+ ____________ [1]	+ ____________ [2]
Mark if taxpayer, or spouse (if filing jointly) was a member of the US Armed Forces in 2020		__ [3]
EIP3 amount projected from your prior year return		+ ____________ [4]
EIP3 projection tax year		______ [5]
Mark if the EIP3 you received matches the **EIP3 amount projected from your prior year return**		___ [6]

NOTES/QUESTIONS: