

REQUIRED 2021 CLIENT QUESTIONNAIRE

NAME(S) _____

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

Personal Information

- | | Yes | No |
|---|--------------------------|--------------------------|
| Did your marital status change during the year?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, explain: _____ | | |
| Did your address change from last year?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Can you be claimed as a dependent by another taxpayer?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit funds from the IRS or other taxing authority during the tax year?.. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you or any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? Attach the IRS letter(s) | <input type="checkbox"/> | <input type="checkbox"/> |

Dependent Information

- | | | |
|---|--------------------------|--------------------------|
| Were there any changes in dependents from the prior year?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, explain: _____ | | |
| Do you have any children under age 19 or a full-time student under age 24 with <u>unearned</u> income in excess of \$2,200?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you provide over half the support for any person(s) other than your dependent children during the year?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay for child care while you worked, looked for work, or while a full-time student?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any expenses related to the adoption of a child during the year?.. | <input type="checkbox"/> | <input type="checkbox"/> |
| 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?..... | <input type="checkbox"/> | <input type="checkbox"/> |

Retirement Information

- | | | |
|--|--------------------------|--------------------------|
| Are you an active participant in a pension or retirement plan?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any Social Security benefits during the year? Attach SSA-1099 | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan <u>other than what is shown on your W-2</u> ?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan? Attach 1099-R | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, were any withdrawals due to a Federally declared disaster?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| If you received any qualified disaster retirement plan distributions in 2020, did you repay any of the distributions in 2021?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you take your IRA required minimum distribution (RMD)? Attach 1099-R | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, did you have it paid directly to charity?..... | <input type="checkbox"/> | <input type="checkbox"/> |

Income Information

- | | | |
|---|--------------------------|--------------------------|
| At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? | <input type="checkbox"/> | <input type="checkbox"/> |
| Attach the following letters if received - 6173, 6174 or 6174-A | | |
| Did you receive an Economic Income Payment (EIP3)? Attach Notice 6475 | <input type="checkbox"/> | <input type="checkbox"/> |
| How much did you receive beginning March 2021? _____ | | |
| Did you retire or change jobs this year?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any unemployment benefits during the year? Attach 1099-G | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any disability income during the year?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any interest or dividend income? Attach 1099-INT/1099-DIV | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you acquire or dispose of any stock during the year? Attach 1099-B | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive tip income not reported to your employer this year?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did any of your life insurance policies mature, or did you surrender any policies?.. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any hobby income? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any awards/prizes/gambling/lottery winnings? Attach 1099/W-2G ... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have an interest in a partnership or S corporation? Attach Sch K-1 | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?.... | <input type="checkbox"/> | <input type="checkbox"/> |

Real Estate Information (Attach Closing/Settlement statement) **Yes** **No**

- Did you purchase, refinance, or sell a **principal residence** during the year?.....
- Did you sell, exchange, refinance or purchase any **rental real estate** during the year?..
- Did you receive any income from property sold **PRIOR** to this year?.....
- Did you receive any rental income reported on 1099-MISC? **Attach 1099-MISC**
- Did you foreclose or abandon a principal residence or real property during the year?....

Business Information (Schedule C)

- Did you start a new business during the year?.....
- Did you receive any income considered to be nonemployee compensation?.....
- Attach 1099-NEC**
- Did you sell, exchange, or purchase any assets used in your trade or business?.....
- Did you sell or purchase an existing business or other property this year?.....
- Were you unable to perform your self-employed activities due to coronavirus related care you needed between 1/1-9/30/21?.....
- If yes, provide specific dates? _____
- 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 between 1/1-9/30/21?...
- If yes, provide specific dates? _____
- Were you unable to perform your self-employed activities due to coronavirus related care you provided to another between 1/1-9/30/21?.....
- If yes, provide specific dates? _____
- If self-employed, did you utilize any area of your home for business purposes?.....
- Did you engage in any bartering transactions? **Attach 1099-B**.....
- If you are a business owner, did you pay health insurance premiums for yourself or your employees this year?.....

Deduction and Credit Information

- Did you receive advanced Child Tax Credit (CTC) payments in July, August, September, October November or December? **Attach IRS letter 6419**.....
- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?..
- Did you make any monetary charitable contributions by check or credit card?.....
- If yes, provide a listing of charities and amounts donated and a receipt for any amount over \$249 to substantiate the contribution.
- Did you make any noncash charitable contributions (clothes, furniture, etc.)?.....
- If yes, provide a receipt from the donor organization, including details of items donated and their fair market value (FMV).
- Did you donate a vehicle or boat during the year? **Attach 1098-C**.....
- 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? **Attach 1098**.....
- Did you take out a home equity loan this year?.....
- If yes, what were the funds used for? _____
- Did you incur interest expenses associated with any investment accounts you held?
- Did you make any major purchases during the year (cars, boats, etc.)?.....
- Did you incur a casualty or theft loss in a Federally declared disaster area?.....
- Did you lend money 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 or student loan(s)? **Attach 1099-C**.....
- Did you make energy efficient improvements to your main home this year?.....
- Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?.....

Education Information

Table with 3 columns: Question, Yes, No. Contains 8 rows of questions regarding education expenses, scholarships, and student loans.

Health Care Information

Table with 3 columns: Question, Yes, No. Contains 4 rows of questions regarding Marketplace Coverage, HSA/Archer MSA contributions, and distributions.

Miscellaneous Information

Table with 3 columns: Question, Yes, No. Contains 9 rows of questions regarding out-of-state purchases, gifts, foreign trusts, and tax returns.

This information is complete and correct to the best of my (our) knowledge.

Taxpayer signature _____ Date: _____

Spouse signature _____ Date: _____