

**2021 CLIENT QUESTIONNAIRE**

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Telephone\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If you answer “Yes” to any of the questions, please provide additional information.

 **Yes No**

Did your marital status change during the year? ⁭ ⁭

Did your address change from last year? ⁭ ⁭

Was there any change in dependents from the prior year? ⁭ ⁭

Did any dependents begin attending college in 2021? ⁭ ⁭

Did you change any bank account that was used to direct deposit ⁭ ⁭

your refund last year?

Did you start a new business or purchase rental property in 2021? ⁭ ⁭

Did you sell or purchase any real estate? ⁭ ⁭

Did you acquire or dispose of any stock? ⁭ ⁭

Did you take out a home equity loan? ⁭ ⁭

Did you refinance a principal residence or second home? ⁭ ⁭

Did you sell an existing business, rental or other property? ⁭ ⁭

Did you have any tuition expenses or pay a student loan? ⁭ ⁭

Did you have any expenses related to seeking a new job? ⁭ ⁭

Did you incur any expenses working as a teacher? ⁭ ⁭

Did you make any contributions to an IRA or Roth IRA? ⁭ ⁭

Did you pay or receive any alimony? ⁭ ⁭

Did you have any debt cancelled in 2021 (reported on 1099-C)? ⁭ ⁭

Did you keep more than $10,000 in a foreign country’s bank account? ⁭ ⁭

Did you earn any income (interest, dividends, rent) in a foreign ⁭ ⁭

country?

Are you covered by a health insurance plan thru your employer? ⁭ ⁭

If you purchased health insurance via the exchange marketplace

did you receive a Form 1095-A? ⁭ ⁭

If you had any medical/dental expenses paid in 2021, please fill out the form.

If you had any cash and non-cash contributions to charities in 2021, please fill out the form.

If you donated a vehicle, please include the 1099 received from the charity.

Did you have any employment expenses that were not reimbursed by your

employer? (travel, office supplies, business meals, auto expenses, business gifts)

Please remember to include the following forms/documents:

-Forms W-2 for wages, salaries, and tips

-All Forms 1099 for interest, dividends, miscellaneous income, etc

-Brokerage statements showing investment transactions for stocks, bonds, etc

-Schedule K-1 showing income from partnerships, S Corporations, estates, and trusts

-Statements supporting deductions for mortgage interest and taxes

-HUD 1 Settlement statements for any real estate purchases or sales

-Any notices sent to you by the IRS or other taxing authority