

Questionnaire

Name: _____

Personal Information

Yes No

- ☐ ☐ Did your marital status change during the year?
If "Yes," explain
- ☐ ☐ Can you or your spouse be claimed as a dependent by someone else?
- ☐ ☐ Did your address change during the year?
Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)

Dependent Information

Yes No

- ☐ ☐ Did you have any changes in dependents during the year?
If "Yes," explain
- ☐ ☐ Can another person qualify to claim any of your dependents?
- ☐ ☐ Did you have any childcare expenses during the year?
- ☐ ☐ Did you have any adoption expenses during the year?
- ☐ ☐ Did you have any children under age 19 or a full-time student under age 24 with more than \$2200 of unearned income?
Provide documentation for proof of dependent related credits (school records, medical records, daycare records, etc.)

Health Care Information

Yes No

- ☐ ☐ Did any member of your household have healthcare coverage through the Marketplace?
If "Yes," provide copies of Form 1095-A.
- ☐ ☐ Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

Income, Purchases, Sales, and Debt Information

Yes No

- ☐ ☐ Did you receive any tips not reported to your employer?
- ☐ ☐ Did you receive any disability income during the year?
- ☐ ☐ Did you cash any U.S. savings bonds during the year?
- ☐ ☐ Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies?
- ☐ ☐ Did you receive any other income not provided with this organizer?
If "Yes," explain
- ☐ ☐ Did you start a new business or purchase any rental property during the year?
- ☐ ☐ Did you sell an existing business, rental property, or other property during the year?
- ☐ ☐ Did you purchase any business assets or convert any assets to business use?
If "Yes," provide the cost of the asset, the date it was placed in service, and business use percentage.
- ☐ ☐ Did you purchase any gasoline, diesel, or special fuels for non-highway business use?
- ☐ ☐ Did you buy or sell any stocks, bonds, or other investments during the year?
- ☐ ☐ Did you sell a principal residence during the year?
If "Yes," provide closing documentation for the purchase and sale of the home
- ☐ ☐ Did you have a principal residence or a piece of real property foreclosed on during the year?
- ☐ ☐ Did you refinance your principal home or second home or take out a home equity loan during the year?
If "Yes," provide all escrow, closing, and other pertinent documentation and information.
- ☐ ☐ Did you receive any principal or interest during this year from property sold in prior years?
- ☐ ☐ Did you rent out your home or use it for business?
- ☐ ☐ Did you sell, exchange, or purchase any real estate during the year?

Questionnaire

- ☐ ☐ ☐ Did you acquire a new or additional interest in a partnership or S corporation?
☐ ☐ ☐ Did you have any debts canceled or forgiven this year?
☐ ☐ ☐ Does anyone owe you money that has become uncollectible?
☐ ☐ ☐ Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?

If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service.

Itemized Deduction Information

Yes No

- ☐ ☐ ☐ Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
☐ ☐ ☐ Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
☐ ☐ ☐ Did you receive any state or local income tax refunds from prior years?
☐ ☐ ☐ Did you make any major purchases (vehicle, boat, etc.) during the year?
☐ ☐ ☐ Did you pay any real estate property taxes or personal taxes during the year?
☐ ☐ ☐ Did you pay mortgage interest during the year?
☐ ☐ ☐ Did you make cash donations to charity during the year?
☐ ☐ ☐ Did you make noncash donations to charity (clothes, furniture, etc.) during the year?
☐ ☐ ☐ Did you donate a boat or vehicle during the year?
 If "Yes," attach Form 1098-C.
☐ ☐ ☐ Did you have gambling winnings or losses during the year?

Retirement Information

Yes No

- ☐ ☐ ☐ Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year?
☐ ☐ ☐ Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), myRA, or other qualified retirement plan during the year?
☐ ☐ ☐ Did you receive any Social Security benefits during the year?

Education Information

Yes No

- ☐ ☐ ☐ Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
☐ ☐ ☐ Did anyone in your household attend a post-secondary school during the year?
☐ ☐ ☐ Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
☐ ☐ ☐ Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?

Miscellaneous Information

Yes No

- ☐ ☐ ☐ Did you incur a gain or loss due to damaged or stolen property?
 If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements.
☐ ☐ ☐ Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
☐ ☐ ☐ Did you make gifts to any one person in excess of \$15,000 during the year?
 If "Yes,"
 Yes No
☐ ☐ ☐ Are you splitting the gift with your spouse?
☐ ☐ ☐ Did you make any energy-efficient improvements to your main home during the year?

Questionnaire

- ☐ ☐ ☐ Are you a business owner who paid health insurance premiums for your employees during the year?
☐ ☐ ☐ Did you apply an overpayment of your 2020 taxes to your 2021 estimated taxes?
☐ ☐ ☐ If you have an overpayment of 2021 taxes, do you want the refund applied to your 2022 estimated taxes?
☐ ☐ ☐ Did you make any estimated payments toward your 2021 taxes?
☐ ☐ ☐ Do you want to have any refund or balance due directly deposited or withdrawn? If "Yes," provide a canceled checking or savings slip.
☐ ☐ ☐ Did you receive any notices from the IRS or state taxing authority?
 If "Yes," explain
☐ ☐ ☐ May the IRS discuss your tax return with your preparer?

Stimulus Payments & Advanced Child Tax Credit

Yes No

- ☐ ☐ ☐ Did you receive the Third Stimulus payment sent by the government (form 1444-C)? If Yes, Bring the form or download it from the IRS website
☐ ☐ ☐ Did you receive the Advanced Child Tax Credit payment sent by the government (Form 6419)? If Yes, Bring the form or download it from the IRS website

Foreign Account Information

Yes No

- ☐ ☐ ☐ Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
☐ ☐ ☐ Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
☐ ☐ ☐ Did you have any income from, or pay taxes to, a foreign country?
☐ ☐ ☐ Did you own property in a foreign country?
☐ ☐ ☐ Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?

Additional Questions

Yes No

- ☐ ☐ ☐ Did you receive income or incur expenses associated with a fantasy sport league?
 If yes, provide documentation.
☐ ☐ ☐ Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?
 If yes, attach Form 1099-MISC and Form 1099-K.
☐ ☐ ☐ Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?
 If yes, attach Form 1099-K or Form W-2.
☐ ☐ ☐ Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?
 If yes, provide documentation.
☐ ☐ ☐ Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?
 If yes, attach Form 1099-K.
☐ ☐ ☐ Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)?
 If yes, provide documentation.
☐ ☐ ☐ Do you anticipate your income or withholdings to be different for 2022?

Signature: _____ Date: _____

Signature: _____ Date: _____

Would you like a copy of your tax return emailed to you instead of receiving a printed copy? Yes ☐ No ☐

If Yes, Provide your email address: _____

What is a letter 6419?

Specifically, it will show you:

- The total amount of advance CTC payments you received for 2021. This information will go on Schedule 8812, line 14f or 15e as applicable.
- Number of qualifying children counted in determining the advance CTC

What is IRS Letter 1444-C?

Similar to a tax form, the letter will:

- outline your personal information, specifically your name and address, and
- show the total 2021 EIP amount the IRS issued you

Anyone who received a 2021 stimulus payment will be sent letter 1444-C.

While you may have received a Letter 1444-C after receiving your stimulus payment, that's not the document the IRS recommends you use prepare your tax return.

What if I can't find my Letter's?

If you're ready to file, but don't have your letter, there is an alternative. You can create an ID.me account to verify the details from the letter.

Here's how to check your Economic Impact Payment:

- Create a new ID.me account (if you don't have one) by going to: <https://www.irs.gov/payments/your-online-account>
- Click **Sign into your Online Account**
- Click ID.me **Create New Account**
- Follow the on-screen instructions to provide information to set up the secure ID.me account. Note that users may be asked to create a live video of themselves (using phone or webcam) and/or upload photo identification. For help, visit the [ID.me help page](#).

Once you've created an ID.me account, you can access your online account at the link directly above.

Make sure you have these forms before you schedule your appointment. If you have any problems downloading the forms, at Tax Associates, Inc. we can help you create the account and download them. Fees apply.