

Client Questionnaire- 2021

Personal Information	YES	NO
- Are you married?		
- Did your address change in 2021?		
- Can you be claimed as a dependent by another?		
- Did your bank account change from the prior year? (2020 on file)		
Dependent Information		
	YES	NO
- Did you have a new child in 2021?		
- Do you have a child/children under the age of 18 or under 24 in college?		
- Do you have any other dependents? (mother, father, relative, etc.)		
- Did any of your dependents have income?		
- Did you pay student loan interest for yourself or child? (1098-E)		
- Will you or have you contributed to a Coverdell or 529 Plan?		
- Did you maintain a home for someone else other than a dependent?		
- Did you pay for childcare? To an Individual or Organization?		
Purchases, Sales and Debt Information		
	YES	NO
- Did you start or end a business during the year? Sole Proprietorship?		
- Did you acquire an interest in a LLC, Partnership or C Corp or S Corp? (K1)		
- Did you own, buy, or sell any real estate? (principal or rental: send closing stmt.)		
- Did you sell any stock or mutual funds during the year? (1099-B)		
- Do you buy or sell Cryptocurrency or Bit Coin? (possible 1099-B)		
- Did you refinance or take out a line of credit? (New HUD-1 or 1098)		
- Did you purchase a hybrid or green appliances?		
Income Information		
	YES	NO
- Did you receive any wages or W2s?		
- Did you receive 1099s? have self-employment income? (1099-MISC or NEC)		
- Did you receive any interest or dividends? (1099-INT or 1099-DIV)		
- Did you receive any lump sum distributions from a pension or 401K? (1099-R)		
- Did you make a withdrawal or roll-over from a retirement plan? (1099-R)		
- Did you receive any unemployment income? (1099-G)		
- Did you receive or pay alimony? What year is the divorce agreement?		
- Did you have any cancellation of debt? (credit card, mortgage, etc.) (1099-C)		
- Did your employer pay for any education?		
- Did you receive any awards from lawsuits? (1099-MISC)		
- Did you receive any Social Security Income? (SSA-1099)		

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Deduction Information		YES	NO
-	Did you incur a casualty or theft loss?		
-	Do you own a home?		
-	Do you have a Home Loan over \$1 Million? What year did you borrow?		
-	Do you have a Home Equity Line of Credit?		
-	Did you pay for PMI? Private Mortgage Insurance?		
-	Did you make any cash/non cash charity donations?		
-	Did you work out of town during the year?		
-	Did you or your dependents go to school? (1098-T)		
-	Do you have any medical expenses?		
-	Did you pay for long term care premiums?		
-	Do you have a HSA or a MSA?		
-	If self employed, did you pay healthcare premiums for you or family?		
Credit Information		YES	NO
-	Have you started an adoption process?		
-	Do you have Covered CA insurance? If so, please send 1095-A & CA-3895.		
-	Did you or will you start a new retirement plan this year?		
-	Did you make any Quarterly Estimated Payments? See below**		
Misc. Information		YES	NO
-	Are you in the military?		
-	Did you make any gifts more than \$15,000?		
-	Are you covered by a pension plan?		
-	Did you make a SEP, Traditional or Roth IRA contribution? How much?		
-	Do you have money in a foreign bank account?		
-	Did you receive the 3rd Stimulus Check?* see below		
-	Did you receive Advance Child Tax Credits?*** see below		
-	Do you expect any significant changes in the next year? (please explain)		
-	Do you want to file electronically?		
Stimulus And Estimated Quarterly Info			
*	How much was your 3rd Stimulus Check? (Deposited between Mar. & Dec. 2021)		
*	Please upload IRS Letter 6475 w/ your tax documents- (Two if married)		
***	Child Credits Received from July-December 2021 (Please upload IRS Letter 6419)		
		Federal	CA
**	How much did you pay for Q1 (due 4/18/21)		
**	How much did you pay for Q2 (due 6/15/21)		
**	How much did you pay for Q3? (due 9/15/21)		
**	How much did you pay for Q4? (due 1/15/22)		