

2021 RETURNING TAX CLIENT QUESTIONNAIRE

NAME _____

SPOUSE'S NAME _____

ADDRESS CHANGED: YES or NO (new address) _____

PREFERRED EMAIL: _____

PREFERRED PHONE: _____

STIMULUS:

3rd Stimulus payment, 2021 Stimulus Check Amount Received \$ _____

Look out for a Letter 6475 from the IRS that says, "YOUR THIRD ECONOMIC IMPACT PAYMENT". Please make sure you send us this form.

- **Did you purchase a home or refinance in 2021? YES OR NO** _____
- **If YES, please provide us with the HUD-1 Settlement Statement or Closing Disclosure.**
- **DONATIONS:** Cash \$ _____ Non-Cash: _____ We DO NOT need your receipts. Please give us just the total amounts. You DO need to retain the receipts for your own records.
- Did you receive **ADVANCED CHILD TAX CREDIT: YES or NO - Amount \$** _____
Anticipate a tax form (Letter 6419) from the IRS in January if money was received and send it to us with your tax documents.
- **DEPENDENT CHILD CARE:** If you had this expense please provide us with the name, address, tax ID# and the amounts paid per child to each facility.

- **Dependent status change:** Did you add or lose a dependent child due to age? _____
Did you add a dependent by welcoming a newborn child or adopt in 2021? Did you lose a dependent due to age? Generally, to qualify as a dependent your child must either be younger than 19 years old or be a "student" younger than 24 years old as of the end of the calendar year.
- Are you a **grade K-12 teacher? YES or NO**

- Did you make any **energy efficiency** improvements such as solar, furnace, central ac, hot water heater, insulation, windows, exterior doors? \$ _____
- If you **rented** for your principal residence in Massachusetts, please provide your landlord's name and the amount \$ _____
- **Commuter Deduction:** Did you have any MBTA or EZ Pass expenses in 2021? **YES or NO**
- Do you have a **foreign account** or **cryptocurrency account**? **YES or NO**

DIRECT DEPOSIT/DEBIT INFORMATION (We highly recommend direct deposit/debit rather than the refund/check for payment method).

Has your banking information changed from last year? YES or NO

If your account has changed from last year, or you want to use a different account, please provide us with the

BANK NAME, ACCOUNT NUMBER AND ROUTING NUMBER.

Please select which account is being used:

CHECKING _____

SAVINGS _____

BANK NAME: _____

FULL ACCOUNT #: _____

ROUTING NUMBER: _____

_____ **YES**, I am fine with receiving an electronic copy of my return and authorize you to shred any copies or originals of my statements that I am submitting.

_____ **NO**, please send me the traditional blue folder as in the past and return my statements. I realize that there is a \$30.00 additional charge.

Who was your tax preparer last year? (circle one)

Bill Dave Nancy