



# 2021 Tax Return Client In-Take Sheet

## Primary Tax Filer Information

Name, First \_\_\_\_\_ Middle Initial \_\_\_\_\_ Name, Last \_\_\_\_\_ Last 4 of SSN \_\_\_\_\_

Preferred Phone \_\_\_\_\_ Email Address \_\_\_\_\_

Driver's License Issue Date \_\_\_\_\_ Expiration Date \_\_\_\_\_ (only needed if expired in past year)

## Joint Tax Filer (if applicable)

Name, First \_\_\_\_\_ Middle Initial \_\_\_\_\_ Name, Last \_\_\_\_\_

Phone \_\_\_\_\_ Email Address \_\_\_\_\_

Driver's License Issue Date \_\_\_\_\_ Expiration Date \_\_\_\_\_

## 2021 General Questions

1. Have you had a change in marital status or dependents?  Yes  No
2. Have you moved to a new address?  Yes  No
3. Did you get health insurance through the Federal Marketplace?  Yes  No  
*\*\* If yes, we need Form 1095-B.*
4. Did you do any gig work (Uber, Shipt, Airbnb, etc) in 2021?  Yes  No
5. Do you have any foreign bank accounts or foreign trusts?  Yes  No
6. Do you own or have you traded in virtual currency in 2021?  Yes  No
7. Did you make any contributions to charitable organizations in 2021?  Yes  No
8. Did you receive the third Federal stimulus payment in April/May 2021?  Yes  No  
*\*\* If yes, we need Letter 6475, Your Economic Impact Payment, received from the IRS in January 2022.*
9. Did you Advance Child Tax credit payments from July -December 2021?  Yes  No  
*\*\* If yes, we need Letter 6419, 2021 Advance CTC, received from the IRS in January 2022.*

Is there anything else you want to be sure your preparer knows about your situation for 2021?

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## Delivery

To keep you and our staff safe, we are hoping to digitally transfer information as much as possible.

1. We plan to deliver returns digitally using Secure File Pro. Can you accept a digital copy of your tax return?  
 Yes  No If no, we will coordinate with you to get a paper copy to you.
2. Have you had any changes to your banking information in 2021 that would affect the direct deposit of tax refunds?  Yes  No

If yes, new account info, please: Routing: \_\_\_\_\_ Acct: \_\_\_\_\_

Bank Name: \_\_\_\_\_  Checking  Savings