

# 2021 TAX RETURN CLIENT UPDATE

**\*\*FOR BETTER ACCURACY, PLEASE PRINT YOUR CURRENT INFORMATION LEGIBLY\*\***

Please print your name as it appears on your Social Security Card, i.e. maiden name

## Taxpayer Information

## Spouse Information

Name \_\_\_\_\_  
Street Address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
SSN \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Cell Phone # \_\_\_\_\_  
Phone #2 \_\_\_\_\_  
Email address \_\_\_\_\_

### Taxpayer's Driver's License Information:

Number \_\_\_\_\_ State \_\_\_\_\_  
Date of Issue \_\_\_\_\_ Expiration Date \_\_\_\_\_

### Spouse's Driver's License Information:

Number \_\_\_\_\_ State \_\_\_\_\_  
Date of Issue \_\_\_\_\_ Expiration Date \_\_\_\_\_

Dependents: Name, SSN, Birthdate (*If Necessary*)

**Dependent 1:** \_\_\_\_\_

**Dependent 2:** \_\_\_\_\_

**Dependent 3:** \_\_\_\_\_

**Dependent 4:** \_\_\_\_\_

## **BRIEF QUESTIONNAIRE**

Thanks for your time, with your help we can better accurately prepare your returns!

### **FOR 2021 (Please Circle One)**

1. Did you have health insurance through the **Marketplace** at all during the year? \* **Yes No**
2. Did you receive an Economic Impact Payment (**stimulus check**)? \* **Yes No**
3. Did you receive **Advance Child Tax Credit** payments in 2021? \* **Yes No**
4. Did you contribute to an **IRA** for 2021? **Yes No**
5. Did you pay **student loan interest** during the year? **Yes No**
6. Did you have a child attending a **private school** or who is **home schooled**? **Yes No**
7. Did you contribute to a **College Choice 529 Plan**? **Yes No**
8. Did you have a **parent living with you**, providing over half of their support/medical bills? **Yes No**
9. Did you have **financial interest** in a **foreign financial account(s)** totaling over \$10,000? **Yes No**
10. Did you buy or sell **virtual currency (Bitcoin, Ethereum, etc) and/or NFTs**? **Yes No**

\* If you answered **YES** to any of the first 3 questions above, we will need copies of the year end forms sent to you by the government.