

Please answer all of the following questions on the next page:

2021 Tax Season Update Questionnaire

	Yes	No
1. Did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual currency at any point in 2021? (EX: bitcoin)		
2. Did you or anyone in your household work outside of your home state? <i>If yes, need copies of driver's license for taxpayer and spouse, (if married).</i>		
3. Did you make any contributions to or withdrawals from a Health Savings Account or Archer MSA in 2021?		
4. Did you make out-of-state purchases by telephone, internet, mail or in person <i>without paying sales tax</i> ?		
5. Did you make gifts of more than \$15,000 to any individual(s)? (This could be multiple gifts totaling to \$15,000.00 in one year.)		
6. Did you receive correspondence from the State or the IRS? <i>If so, please provide copies of all such notices if you haven't done so already.</i>		
7. Did you receive notification <i>that the IRS reduced or disallowed a credit in the previous years</i> ? <i>If so, please provide a copy of the letter.</i>		
8. Did you receive an IRS PIN for your 2021 tax return? <i>If so, please provide a copy of the letter.</i>		
9. Did you live in another state during the Covid Pandemic?		
10. Did you work from a different state than what you normally would in 2021?		
11. Did you or anyone in your household receive unemployment benefits or compensation under the Coronavirus Relief Act? <i>If yes, you must login to your unemployment account for the Form 1099-G; it will not be mailed to you.</i>		
12. Did you or anyone in your household have more than one job?		
13. Did you receive emergency family leave wages?		

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Yes No

14. Are you a telecommuting employee that was required to “shelter in place” due to local Covid-19 protocols while working in a state that was not your home state?

15. Did you or anyone in your household receive an CARES ACT Economic Stimulus payment in 2021?
If yes, please provide Letter 6475.

16. Did you receive advance child tax credits in 2021? If yes, please provide IRS Letter 6419

17. Do you and/or spouse have a business? If yes, business name(s)_____

Entity: Sole Proprietor Single Member LLC Partnership Corporation

- a.** If you are a business owner, did you receive a Paycheck Protection Program (PPP) loan?
- b.** If yes, did you apply for PPP loan forgiveness?

18. If you are self-employed, were you unable to perform your self-employee activities due to Covid-19 related care for yourself; a family member or to another?

19. If you or anyone in your household was self-employed or worked in the gig economy, did you/they receive NJ PUA funds in 2021?

20. Did you reside in or operate a business in a Federally declared disaster area?

21. Were you a victim of a Federal declared disaster such as a hurricane, tropical storm, flooding, or wildfire?
