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### 2021 Tax Season Update Questionnaire

Date			

Client Name:

We provide one copy of your tax return per year.

Please select one: Paper \_\_\_\_\_ or Digital \_\_\_\_\_

Please note if you select paper, additional copies will be \$25 per request.

If you opt for a digital copy you will not receive a paper copy of your returns and it is your responsibility to print and save your tax returns.

We need *two different e-mails* on file if you are filing a joint tax return.

Please circle if any of the following changed so we can provide you with a different questionnaire:

Address E-mail Phone Phone Carrier

- Marital Status Change: Please Provide Marriage Certificate, Divorce Decree and/or new Social Security Card for name change if applicable.
- New Dependent (s): Please provide copies of social security card & birth certificate.
- If you bought, sold or refinanced your real estate property: provide a copy of your closing statement.

\*Please note that we cannot file your returns without the before mentioned documents if these life changes took place.

Did you have healthcare for all of 2021?YesNoIf yes, was it provided through the Affordable Care Act?YesNoIf yes, Form 1095-A is required to complete your tax return.

Bank Account Change: Please provide a copy of a voided, blank check. Do not provide a deposit slip!

## 2021 Tax Season Update Questionnaire

		Yes	No
1.	<b>Did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual currency at any point in 2021?</b> (EX: bitcoin)		
2.	<b>Did you or anyone in your household work outside of your home state?</b> If yes, need copies of driver's license for <b>taxpayer and spouse</b> , (if married).		
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 without paying sales tax?		
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.	<b>Did you receive correspondence from the State or the IRS?</b> If so, please provide copies of all such notices if you haven't done so already.		
7.	<b>Did you receive notification</b> <i>that the IRS reduced or disallowed a credit in the previous</i> <b>years?</b> If so, please provide a copy of the letter.		
8.	<b>Did you receive an IRS PIN for your 2021 tax return?</b> If so, please provide a copy of the letter.		
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	<b>. Did you or anyone in your household receive unemployment benefits or compensation under the Coronavirus Relief Act?</b> If yes, you <u>must</u> login to your unemployment account for the Form 1099-G; it will <u>not</u> be mailed to you.		
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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### <u>Please answer all of the following questions on the next page:</u>

# 2021 Tax Season Update Questionnaire

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