

**2021 1040 US Miscellaneous Questions**

**2021 Individual Tax Questionnaire**

Please answer the following questions. If you are not sure of the answer, please leave it blank and we can discuss it. **If you don't return this questionnaire with your tax information, we will assume that the answers to these questions are "No".**

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status, mailing address, or phone number change during the year? If yes, please provide new contact information.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your bank account information change within the last twelve months?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Will any dependents you claimed last year be claiming themselves or be claimed by someone else this year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any dependent child between 19 and 23 years of age attend school less than 5 months during the year? If so, they may no longer be your dependent.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your dependents receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a third Round Economic Impact Payment in 2021 (mid year, not January)? If so, How much? _____  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive Advanced Child Credit payments from the IRS in 2021? If so, please attach the letter or letters that you received from the IRS that confirms the amount of payments you received. <b>I CANNOT COMPLETE YOUR RETURN WITHOUT THIS INFORMATION.</b> |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a retirement plan because of COVID?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you a member of one of the Five Civilized Tribes in Oklahoma - if so, do you live and work on your own tribal land? If so, please provide a copy of your membership card   |
| <input type="checkbox"/> | <input type="checkbox"/> | Even if you don't have enough contributions to itemize, did you make a cash contribution at least \$300 (\$600 if married filing joint) to one or more organizations? The first \$300 or \$600 may be deductible "above the line". Please provide receipt.       |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any out of state purchases (including online purchases) on which you did not pay sales tax? If so, you are required to pay use tax with your state tax return. Total Purchases: \$ _____ or ___ Use table amount.                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? Please provide us with any documents received.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes (other than in US brokerage accounts)?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you received, or should have you received, any w-2s, 1099s, or, 1095s that you have not provided to us?   |

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<input type="checkbox"/>	<input type="checkbox"/>		Have you provided us with information regarding <b>all of your taxable income</b> , including barter income, gambling income, and other items not reported on a Form 1099 or other tax document?
<input type="checkbox"/>	<input type="checkbox"/>		<b>Did you own or use Bitcoin or ANY other form of cryptocurrency in 2021?</b>
<input type="checkbox"/>	<input type="checkbox"/>		Did you engage the services of any household employees? <i>Someone who sets their own hours, provides their own supplies, decides how the work is to be done, and provides services to multiple customers in probably not your employee. If you have household employees, you may be required to issue a W-2 and pay payroll taxes.</i>
<input type="checkbox"/>	<input type="checkbox"/>		Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
<input type="checkbox"/>	<input type="checkbox"/>		Did you buy or sell any stocks or bonds not held in a brokerage account, or other investment property in 2021? Please provide closing statements or documents received (1099-B or 1099-S for example)
<input type="checkbox"/>	<input type="checkbox"/>		<b>Did your business have any PPP loan amounts forgiven in 2021?</b>
<input type="checkbox"/>	<input type="checkbox"/>		Did you have any other debts canceled or forgiven? Please provide us with any 1099-C or 1099-A that you have received.
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
<input type="checkbox"/>	<input type="checkbox"/>		Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.) that is <b>NOT</b> on your W-2?
<input type="checkbox"/>	<input type="checkbox"/>		Have you <b>already made</b> a 2021 IRA contribution? Please provide documentation of the contribution. OR, ___ I will not make an IRA or SEP contribution, ___ I want to make an IRA or SEP contribution of ___ the maximum amount, some other amount \$ ___ or please advise how much I can contribute ___.
<input type="checkbox"/>	<input type="checkbox"/>		Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2021?
<input type="checkbox"/>	<input type="checkbox"/>		Did you or your spouse receive a pension or annuity in 2021 for services performed as an employee of the US, state, or local government for work not covered by social security?
<input type="checkbox"/>	<input type="checkbox"/>		Did you have a distribution from an Education Savings Account or a Qualified Tuition Program? If so, please provide documentation for the distribution received and documentation for expenses paid.

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- Did you apply an overpayment of 2020 taxes to your 2021 estimated tax (instead of being refunded)?
- If you have an overpayment of 2021 taxes, do you want the excess applied to your 2022 estimated tax (instead of being refunded)?
- Do you expect your 2022 taxable income and withholdings to be substantially different from 2021?
- Did you receive payments under a long-term care (LTC) insurance contract or receive any accelerated death benefits from a life insurance policy?
- Were you notified of a change in prior year returns or audited by either the Internal Revenue Service or the State taxing agency? Please provide copies if we do not already have them.
- May the IRS discuss your tax return with your tax preparer?
- Would you prefer to receive next year's organizer electronically?

Please answer only if you expect to itemize this year - *remember the standard deduction for Single status is \$12,550, Married filing Joint is \$25,100, slightly higher if you are 65 or over.*

- |                          |                          |
|--------------------------|--------------------------|
| Yes                      | No                       |
| <input type="checkbox"/> | <input type="checkbox"/> |

Did you make a **charitable contribution of "stuff"** (anything other than cash, check or credit card contributions)? *Please provide all donation forms from these charities, with donation value entered on the form, and a list of all of the items for which you are claiming a deduction. These items need to be in "good used" or better condition. "Three bags of clothing" is not sufficient detail. The receipts must be dated and contain a statement that no goods or services were provided in exchange for your contribution.*
- |                          |                          |
|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------|--------------------------|

Do you have adequate documentation to substantiate all charitable contributions? *This includes receipts or bank records for contributions of less than \$250 each, and acknowledgment letters for all contributions in excess of \$250. Your acknowledgment letters must state that "no goods or services were provided", a statement that "only intangible religious benefits" were received or a list of what you received and its value.*

**Your Answers to these questions may not change your tax, but are required to be reported:**

- |                          |                          |
|--------------------------|--------------------------|
| Yes                      | No                       |
| <input type="checkbox"/> | <input type="checkbox"/> |

**Did you have an interest in or signature or other authority over a financial account in a foreign country**, such as a bank account, securities account, or other financial account? *(Foreign Stocks held in a US brokerage account do not count. If you have signature authority over an account, including that of an employer or relative, you should answer Yes.*
- |                          |                          |
|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------|--------------------------|

Did you have **stock, or any other ownership interest in any foreign** corporation, partnership, trust, estate, fund or other entity that is not held in a US brokerage account, or any financial instrument or contract issued by a foreign person or business?

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- Did you receive a distribution from a foreign trust or did you inherit money or property from a foreign citizen or resident?
- Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive an HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary?
- Did you roll over any distribution from a 401(k), pension, profit-sharing or retirement plan, or Individual Retirement account (IRA)? Please provide any 1099-R.
- Did you or your spouse make any gifts to an individual that total more than \$15,000, or any gifts to a trust?

Answering Yes to these questions may reduce your tax:

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy / install any certified energy efficient home improvements? If so, please provide certificates and documents received.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used for business?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your vehicle used for business? If so, do you have written documentation to substantiate all vehicle usage, including total miles driven during the year and all business miles driven during the year for each vehicle used for business. A written record completed from calendar entries, receipts, invoices, bills for maintenance is sufficient. "80% of my miles were for business" is NOT sufficient.                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have documentation to substantiate all <b>business travel and meal expenses</b> , including the business purpose for each expense. <i>This includes receipts for all lodging expenses and for other business travel and meal expenses over \$75. No meals have been categorized as travel, lodging or hotel expense. <b><u>Entertainment is no longer deductible and should not be included in your expenses.</u></b></i> |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent pay interest on a student loan?   |

**If you would like to contribute to the Presidential Campaign Fund or a charitable fund:**

- | Yes                      | No                       |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to allocate \$3 (\$6 on a joint return) to the Presidential Election Campaign Fund? |

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Do you want to contribute part of your refund to any state fund? Contributions will reduce your refund by the amount contributed and will count as a charitable contribution on next year's return.

**Other information and notes:**

Are there any issues that you would like to discuss with us or topics about which you would like additional information?

We want to provide first-rate service to each of our clients. Do you have any suggestions as to how we can improve the level of service we provide you?