Tax Return Questionnaire

- **1.1 Do you agree to provide all pertinent information and documentation requiredto file your Federal, State, Business, Corporate or Nonprofit Organizations Tax return before submission?**

Yes _____ No_____

- **1.2 Did you receive any notices from the IRS, any state tax, or county tax authority during the past year regarding your taxes that you have not already provided us? (Please provide a copy of all).**

Yes ____ No_____

- **1.3 Did you get married or divorced during 20______(filing year)?**

Yes ____No_____

- **1.4 Did you live and/or work in more than one state and/or country during 20______ (filing year)? If so, please provide a written detailed summary of where you lived in 20_____ (filing year) including dates for each place. Please provide a separate summary for each spouse, if not the same. You may also report this information to Tasha during your client intake interview.**

Yes _____ No____

- **1.5 Did you or your spouse pay in excess of $1,000 in any quarter, or $2,200 during the year for domestic services performed in or around your home to individuals who could be considered household employees (housekeepers, maids, childcare providers, gardeners, home health care providers etc.), where when that individual(s) file their own taxes they will be required to report wages/income/commission that you paid them for services? This does NOT include individuals who have a business that provides these services to other clients as well.**

Yes _____ No _____

- **1.6 Did you earn wages in 20_____ (filing year)? If so, please submit all reported W-2s to Tasha's Taxes.Yes ______ No______**

- **1.7 At any time during 20_____(filing year) did you receive, sell, send, exchange or otherwiseacquire any financial interest in any virtual currency? If so, please provide us with a written detailed report of all purchase, sale, or exchange details. You may also report this information to Tasha during your client intake interview.**

Yes _____ No_____

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- **1.8 Did you pay or receive any alimony in 20_____ (filing year) (do NOT include child support)?Yes_____ No_____**
- **1.9 Did you receive any unemployment compensation in 20_____(filing year)? If so, please ensure you submit your Form 1099-G to Tasha's Taxes (if you do not have your 1099-G form please speak with Tasha so that she may assist you in retrieving your documentation).**

  Yes _____ No_____
- **2.1 Did you receive the SECOND Economic Impact Payment in 2020? This was a stimulus payment as a result of the CARES Act that you may have received in mid-2020 by check, direct deposit, or debit card.**
  Yes _____ No______
- **2.2 Did you receive the THIRD Economic Impact Payment? This was a stimulus payment as a result of the Coronavirus Response and Relief Supplemental Appropriations Act that you may have received in late December 2020 or early 2021 by check, direct deposit, or debit card.**

  Yes______ No_____
- **2.3 Did you have any foreign financial income (NOT including income within adomestic investment account), foreign bank accounts, foreign trusts, or any other foreign financial activity or assets at any time during 20 ______ (filing year)? This information will be discussed further during your client intake interview.**

  Yes______ No____
- **2.4 Did you have any other income from any source that you have not provided to us (including cash earnings, tips, bartering, etc.)? This should NOT include gifts received. If so, please provide a detailed summary to us or inform Tasha during your client intake interview.**

  Yes ______ No______
- **2.5 Did you or a family member (taxpayer, spouse, and dependents) enroll in health insurance coverage for 20_____ (filing year) through the Health Insurance Marketplace (Exchange)? If yes, please provide a copy of Form 1095-A. Please contact your health insurance provider if you have not received your form for 20____ (filing year).**

  Yes ______ No ______
- **2.6 Did you pay premiums for a long-term care insurance policy? If so, please provide a copy of your annual bill paid in 20_____(filing year). You may have to contact your insurance provider for this statement.**

  Yes _____ No____

- **2.7 Did you pay any student loan interest in 20 _____ (filing year)? If so, please is submit all 1098-Eforms to Tasha's Taxes.**

  Yes______ No______

- **2.8 Did you work in grades K-12 in any of the following roles: teacher, counselor,aide, or principal?**

  Yes _____ No____

- **2.9 Did you buy or refinance a personal residence in 20_____ (filing year), including a secondhome? If so, please submit the purchaser (or borrower) settlement statement.**

  Yes _____ No____

- **2.10 Did you sell any real estate in 20 _____ (filing year), including a principal residence? If so, please include the seller settlement statement and any additional selling costs not included on the settlement statement. Also, provide the original purchase date, cost, and a list of any capital improvements made during ownership if we wouldnot have this from prior years. This information can also be discussed further during your client intake interview.**

  Yes ______ No_____

- **3.1 Did you incur a casualty (flood, hurricane, tornado, fire, earthquake),disaster, or theft loss in 20_____ (filing year) in a FEDERALLY DECLARED DISATER AREA? If so, this needs to be discussed in further detailed during your client intake interview if you have any question please write them down for submission and Tasha will follow up with you for more in depth answers or details.**

  Yes ______ No _____

  ____

  ____

- **3.2 Did you make any residential energy efficient improvements to your mainhome during 20____ (filing year)? These may include, but are not limited to, insulation, windows, doors, water heaters, furnaces, etc.?**

  Yes_____ No_____

- 3.3 How would you like to receive your refund, if applicable?

  Direct Deposit ______ Office Issued Cashiers Check____

  Office Issued GO2 Bank Debit Card _____ ?

  - Are you interested in the Refund Advance Program?

    Yes____ No____

    If yes, please speak with Tasha for further details.

- 3.4 If you owe money, would you like to have it automatically withdrawn from your bank account?

  Yes____ No_____

- 3.5 Did you make any estimated tax payments in 20_____ (filing year) (in addition to withholding from your wages)?

  Yes____ No___

- 3.6 In 20____ (filing year), did you have any dependents (including someone who is not your child but whom you supported)?

  Yes ____ No____

- 3.7 Did you pay for any child care so you or your spouse if married could work, look for work, or attend school, for any child under the age of 13?

  Yes ______ No ______

- 3.8 Did you or anyone listed on your tax return attend a private or public college, or an accredited school or university during 20_____ (filing year)?

  Yes_____ No____

Clients Initials _______

- **3.9 Did you make any contributions to an education savings account in 20____ (filing year)?**

  Yes____ No____

- **3.10 Did you have any additional earnings from investment accounts in 20_____ (filing year)? This would include interest, dividends, and capital gains.**

  Yes______ No_____

- **Did you have any distributions (withdrawals) from retirement accounts, includingIRA's, pensions, or receive social security in 20____ (filing year)?**

  Yes _____ No____

- **Did you (or will you) make contributions to IRA accounts for**

  20____ (current and prior filing year)? Yes _____ No______

- **Did you make any contributions to or withdrawals from your Health Savings Account in 20 _____ (filing year)?**

  Yes _____ No____

- **Did you make any charitable contributions in 20____ (filing year)?**

  Yes _____ No____

- **4.1 All taxpayers have the option each year to deduct either actual itemized deductions(mortgage interest, taxes, etc.) or the standard deduction. Due to recent tax law changes, many more taxpayers will benefit from the itemized deduction rather than the standard deductions. We still encourage you to submit all your documents and expenses for the itemized deductions so that we can determine the best deduction for you.**

  As of January 6, 2022, the basic standard deduction is $12,950 (single or married filing separately); $19,400 (head of household); and $25,900 (married filing jointly).

Clients Initials ______

To help you better understand your filing options please read the outline below.

The standard deduction is a specific dollar amount that reduces the amount of income on which you're taxed. Your standard deduction consists of the sum of the basic standard deduction and any additional standard deduction amounts for age and/or blindness. In general, the standard deduction is adjusted each year for inflation and varies according to your filing status, whether you're 65 or older and/or blind, and whether another taxpayer can claim you as a dependent. The standard deduction isn't available to certain taxpayers. You can't take the standard deduction if you itemize your deductions.

- **Expenses (Itemized Deductions) requires a more in-depth interview to ensure all information is reported accurately on your behalf, please understand due to the detailed review required to process your tax return accurately, you must agree to provide all pertinent information regarding reported expenses to include any and all bank statements, accounting records, etc.**
    - **If you cannot reply with the request to provide all pertinent information, records and unaltered documents, then please note that Tasha's Taxes cannot and will not be able to work for you.**

Do you agree to provide all needed and necessary items to Tasha's Taxes?

YES_____ NO_______

- **Did you purchase rental property during 20_____ (Filing Year)?**

Yes____ No____

- **Did you own any rental property that is not reported on a separate tax return (please do not include details that you already provided for a separate LLC orpartnership tax return)?**

Yes ______ No______

- **4.2 Were you self-employed, or earn wages that were reported to you on a 1099MISC, 1099NEC, or have a business that is considered a side job, or were paid directly in cash, or did you own a business that does NOT file a separate income tax return?**

If your business files a separate income tax return (such as Form 1120S or 1065), then it will not be reported on your personal tax return. If your business files, it's income tax details on a Schedule C then the information can be reported on your personal return. If you are unsure of how to report your business please, discuss further with Tasha during your client intake interview.

Yes____ No _____

Clients Initials ______

- **4.3 Did you use a vehicle for business, or work purposes in 20_____ (filing year)?**

  Yes _____ No_____

- **4.4 Did you dispose of any vehicles during 20_____ (filing year) that you used for any business purposes, rental property, job, etc. that you deducted on your taxes in the past?**

  Yes No

- **4.5 Do you have a home office? Yes____ No _____**

After you have completed this form, you will be given additional paperwork, these forms are so that all IRS, Federal, State, and Local compliance laws, rules and regulations are being met. If you have any questions about the forms, you are filling out, please do not hesitate to ask Tasha about them as it, is her due diligence to ensure that you understand the necessary steps and procedures that are being taken on your behalf in order to work for you. As you are submitting very sensitive data and as such you are required to know and understand what is not only required of you but of Tasha's Taxes.

Clients First Name and Last Name: Clients Initials:

_____________________________________ _____________

Clients Signature:

____

Today's Date:_________________________

Spouse First Name and Last Name (if applicable) Spouse Initials:

_____________________________________ _____________

Spouse Signature:

____

Today's Date:__________________________

Preparers Name: Preparers Signature:

___________________________ __________________________________

Today's Date: ______________________________