



**DID YOU RECEIVE ANY OF THE FOLLOWING DURING 2021?**

Social Security Benefits? Yes [ ] No [ ] Interest Income? Yes [ ] No [ ] Stocks/Dividend Income? Yes [ ] No [ ]  
Unemployment Wages? Yes [ ] No [ ] Gambling Winnings? Yes [ ] No [ ] Cancellation of Debt? Yes [ ] No [ ]  
Self-Employment Income? Yes [ ] No [ ] Real Estate Rental Income? Yes [ ] No [ ] Retirement Yes [ ] No [ ]

Have you paid any Estimated Taxes during 2021? Yes [ ] No [ ] Federal \$ \_\_\_\_\_ State \$ \_\_\_\_\_

Did you receive your 3<sup>rd</sup> Stimulus Economic Impact Payment (\$1,400 for each person)? Yes [ ] No [ ] \$ \_\_\_\_\_

Did you receive the Advanced (monthly) Child Tax Credit? Yes [ ] No [ ] Total Amount Received \$ \_\_\_\_\_

Please provide IRS letters as proof that you received the Stimulus and/or the Advanced Child Tax Credit. (WE NEED THIS TO COMPLETE YOUR TAX RETURN)

**REFUND INFORMATION**

**HOW WILL YOU LIKE YOUR TAX REFUND?**

[ ] DIRECT DEPOSIT: IRS (deposit) \_\_\_\_\_ R.A. Bank deposit: \_\_\_\_\_ (tax prep fees taken out)  
[ ] CHECK: Mail to home: \_\_\_\_\_ Office Check: \_\_\_\_\_ (tax prep fees taken out)

**HAVE YOU CHANGED YOUR BANKING INFORMATION? Yes [ ] No [ ]**

Name of Bank: \_\_\_\_\_ Account Type: Checking: [ ] Savings: [ ]  
Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

**TAX PREPARATION FEE**

For your convenience, do you want the Tax Prep Fees deducted from your refund? Yes [ ] No [ ]

If yes, what is your mother's maiden name (Security Questions)? \_\_\_\_\_

**Please note: Paying upfront saves you money \$\$\$, if you choose for the tax prep fees to be taken from your refund, the bank charges a fee of \$59.95 for Federal Returns and \$12 for the State, a total of \$71.95 could be saved if you pay upfront!**

Please be advised: **ALL FEES** are automatically calculated by the system based on work done, forms required and filing option chosen. **PAYMENT IS REQUIRED UPON COMPLETION OF YOUR TAX RETURN.**

**HOW DID YOU HEAR ABOUT US?**

Returning Client [ ] New Referred Client [ ] New Walk In [ ] Church Promotion [ ] Other [ ] \_\_\_\_\_

Name of Person you referred or who referred you: \_\_\_\_\_

*I hereby certify that all the answers on this Client Information Sheet are to the best of my knowledge, true, correct, and complete.*

Name (Print): \_\_\_\_\_

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**E-File Information: (E-Filing of Returns is IRS Mandated; it promotes Greater Security, Accuracy and Faster Refunds).**