



**2021 Tax Season
Tax Check List**

1. How many jobs did you work in 2021? _____
2. Where you self-employed in 2021? _____
3. Did you receive interest income in 2021? _____
4. Did you receive unemployment in 2021? _____
5. Did you receive any type of settlement in 2021? _____
6. Did you receive social security in 2021? _____
7. Did you receive disability? _____ **(If Yes You Should Not Be Filing a Tax Return)**
8. Did you receive an Economic Impact Check (Stimulant) in 2021? _____ If **yes** you should have a form 6475 that you received from the IRS.
9. Did you receive Child Tax Credit payment (The check you received monthly) _____ If **yes** you should have a form 6419 from the IRS
10. Did you receive and W2G(s) from any gaming establishment in 2021? _____
11. Did you pull any money out of your retirement in 2021? _____
12. Where you, your spouse or depend child in college in 2021? _____
13. Are you purchasing (buying) your home? _____
14. Did your home foreclose in 2021? _____
15. Did you get forgiveness of any credit card debt(s)? _____
16. Do you have a debt with the IRS? _____ Do you owe back child support? _____
17. Do have an outstanding unpaid student loan? _____
18. Do you have health insurance? _____ Do the child(ren) have health insurance? _____
19. Was your health insurance with the Market Place (Affordable Care Act)? _____
20. Would you like your refund put on a Walmart Money Card, Your Prepaid Card, Direct Deposit (**void check required**), or Printed Check from office my office?
21. Would you like to apply for the Fast Cash Advance up to \$6000.00? _____

Signature of Primary Taxpayer, Date

Signature of Spouse (if applicable), Date

Taxpayer's Social Security Number

Spouse's Social Security Number