

# Check-in

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Your Name

rev 02/22

What is the best way to contact you? (email and/or phone number)

## Part 1: Indicate which of the following items pertain to your tax information

Yes

I / We got the 3rd COVID stimulus check (should be \$1400/individual). Total received : \$ \_\_\_\_\_

Received Advance Child Tax Credit payments. How much? \_\_\_\_\_ or include IRS letter 6419.

Included documents to prepare a tax return for my son / daughter / mom / dad / other.

Included documents for a tax return (**prior to 2021**) to be reviewed, prepared or amended.

Included documents for business or other activity that requires a **separate** tax return. (LLC / Trust)

Included a memory stick containing information to use for my tax return.

Included a memory stick with a QuickBooks file: version \_\_\_\_\_ (pw: \_\_\_\_\_)

Yes

No

Direct **Deposit** of my refund(s).

Direct **Draft** of my tax payment(s).

Use same bank information as last year -OR- enter new bank information (or voided check) here:

\_\_\_\_\_ routing number

\_\_\_\_\_ account number

## Answer the following 2 items either "Yes" or "None" **AND** Sign and Date where indicated.

Yes

None

\*  \*  Included my Bitcoin or virtual currency transactions, **or** I had no virtual currency transactions.

\*  \*  Included information on my foreign bank account(s) **or** I had no foreign bank accounts.

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Today's Date

I have subsidized health insurance and included my **Form 1095-A**. (Form 1095-B, 1095-C NOT required).

I may want to make a retirement plan contribution (IRA, SEP, 401(k)) before the deadline.  
Please contact me with my options.

I have **additional** documents to bring in.  
(Ex. corrected investment statement, K-1s, rental property information, etc.)  
**(please indicate what are they and when will you get them? - if you know.)**

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**Part 2: Indicate if any of the following pertain to you for 2021**

- |  |   |
|--|---|
| <input type="checkbox"/> <b>Bought or Sold</b> real estate<br>(need the HUD-1's or settlement stmts) | <input type="checkbox"/> <b>Paid or Received</b> alimony (how much?)<br>(what was your divorce/separation date _____) |
| <input type="checkbox"/> Sold stock or other investments   | <input type="checkbox"/> Got Married / Divorced / Separated / Remarried   |
| <input type="checkbox"/> Own a business or have rental property                                      | <input type="checkbox"/> Made estimated tax payments<br>(how much, on what dates)                                     |
| <input type="checkbox"/> Paid college expenses   | <input type="checkbox"/> Moved to a new address (date of move)  |
| <input type="checkbox"/> Received retirement or pension benefits                                     | <input type="checkbox"/> Retired / Moved to a retirement facility   |
| <input type="checkbox"/> Made non-cash contributions to charity                                      | <input type="checkbox"/> Became Disabled / Deceased   |
| <input type="checkbox"/> Paid daycare expense for dependent.   | <input type="checkbox"/> Had large medical expenses / nursing home care   |
| <input type="checkbox"/> Contributed to IRA / ROTH / SEP etc   | <input type="checkbox"/> Contributed to an HSA ( <b>other than thru work</b> )  |

**Part 3: Indicate any changes or new information for 2021.**

**NEW Clients - Fill out completely**

**Established Clients - Leave blank if NO Changes**

Name (first, mi, last)	Social Security Number	Date of Birth	Occupation
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Spouse Name (first, mi, last)	Social Security Number	Date of Birth	Occupation
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Home address (street, city, state, zip)
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**Your Dependents (children and others living in your household)**

*son, daughter, etc*

Name (first, mi, last)	Social Security Number	Date of Birth	Relationship to you
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Name (first, mi, last)	Social Security Number	Date of Birth	Relationship to you
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Name (first, mi, last)	Social Security Number	Date of Birth	Relationship to you
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Name (first, mi, last)	Social Security Number	Date of Birth	Relationship to you
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**Contact Information - Indicate a phone number or email address we should use to contact you.**

Your work phone	Your cell phone	Spouse work phone	Spouse cell phone	Home phone
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Your email address
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Spouse email address
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**Part 4: Emailing a copy of your tax returns (BE SURE WE HAVE YOUR CORRECT EMAIL ADDRESS)**

- Email me a copy of my tax return for review before finalizing the returns.
- I would like a pdf version of my tax returns emailed to me when they are completed.