

2021 Individual Taxpayer Questionnaire

Taxpayer Name	Spouse Name
----------------------	--------------------

Taxpayer	Are you new to our firm?
-----------------	--------------------------

Are you blind?	Are you totally disabled?	Email	IP PIN
----------------	---------------------------	-------	--------

Occupation	Date of birth	Home/Cell
------------	---------------	-----------

Spouse	Are you new to our firm?
---------------	--------------------------

Are you blind?	Are you totally disabled?	Email	IP PIN
----------------	---------------------------	-------	--------

Occupation	Date of birth	Home/Cell
------------	---------------	-----------

Photo ID & Social Security Cards required for all new clients or clients with expired ID for both Taxpayer and Spouse. SS cards only for dependents.

Dependent Information. If you answer yes to any of the below questions, please fill out the table.

Did any child have income above \$1,050 for the year? If yes, was the income over \$2,300?
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for this tax year?

Names of dependent children with income over \$1,050	<i>Income from working</i>	<i>Social Security Income</i>	<i>Investment Income</i>	<i>Support Worksheet completed</i>

Additional Dependents (overflow from envelope)

<i>Name</i>	<i>Social Security #</i>	<i>Birthdate</i>	<i>If over 18, student?</i>	<i># of months lived with you</i>

Marital status as of 12/31/21: Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure

Were you divorced or separated during the year? Did your dependents change during the year? Unsure

Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.

Have you received any notice from the IRS or state revenue department within the past year (that we don't already know of)?

If you are due a refund, would you like it directly deposited into your bank account? Yes—Direct deposit

If you have a balance due, would you like it directly debited from your bank account? Yes—Direct debit on _____(date if before due)

Name of bank	Type: Checking Savings
--------------	------------------------------

Routing #	Account #
-----------	-----------

COVID-19 RELATED INFORMATION

YES	NO	Letter or transcript print out/screen shot required for proof of EIP #3 payment/no payment.
		Did you receive the 3rd stimulus payment (EIP #3) of up to \$1400/person?
		Did you attach proof of the amount you are claiming?

How much did you receive?

2021 Individual Taxpayer Questionnaire

Virtual Currency. If yes to the below questions, provide statements, forms 1099-B or other documentation of transactions.			
YES	NO	"You" refers to both taxpayer and spouse. leave blank if unsure about a question.	
		Did you buy any virtual currency/crypto currency? (such as bitcoin)	
		Did you sell any virtual currency/crypto currency?	
		Did you use virtual currency for any transactions?	
Questions—All Taxpayers (New and Prior Clients)			(Provide related statements or other documentation)
Income			
YES	NO	"You" refers to both taxpayer and spouse. leave blank if unsure about a question.	
		Do you have W-2 income?	
		Did you receive alimony in 2021?	Date divorce was final
		Do you have gambling winnings?	
		Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?	
		Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?	
		Did you roll over any amounts from a retirement account in 2021?	
		Did you sell or purchase a main home during the year? If yes, provide closing statement(s).	
		If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.	
		Did you sell or transfer any rental or investment property?	
		Did you receive income from an installment sale?	
		Were you granted, or did you exercise, any employee stock options during 2021?	
		Do you have stock sales income?	Do you have basis info if it's not included on your Form 1099-B?
Deductions All Taxpayers			
YES	NO	"You" refers to both taxpayer and spouse. leave blank if unsure about a question.	
		Did you refinance a mortgage or take a home equity loan? (provide closing statement)	
		Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?	
		Did you pay interest on a loan for a boat or RV that has living quarters? If yes, provide details.	
		Did you pay alimony in 2021?	Date divorce was final
Deductions SELF EMPLOYED TAXPAYERS			
YES	NO	If yes to either of the below, please complete the home office and/or auto expense worksheet (available upon request)	
		Did you work from a home office (that is exclusively used for your business) and are self employed?	
		Did you drive your vehicle for business purposes, keep a mileage log, and are self employed?	
State information		Full-Year resident	Part-year resident
States of residence & dates			

2021 Individual Taxpayer Questionnaire

Questions—All Taxpayers		(Provide related statements or other documentation)
YES	NO	"You" refers to both taxpayer and spouse. leave blank if unsure about a question.
Dependent Related Questions		
		Were any children born or adopted in 2021?
		Did you make any contributions to a 529 plan in 2021?
		Did you receive distributions from a 529 plan in 2021?
General Questions		
		Do you want to electronically file your tax return(s) if possible?
		Do you want to designate \$3 of tax funds to the Presidential Election Campaign Fund?
		Were you a citizen of or lived in a foreign country in 2021?
		Do you own or have financial interest in a foreign bank or other financial account?
		Are you Military Member? If yes, are you on Active Duty or in the Reserves? YES / NO
		Are you or your spouse (if filing jointly) a dependent of another person?
		Did you receive federal retirement income from civil service? (If yes, provide dates employed and retirement date)
		Did you make any political contributions?
		Did you purchase a new electric vehicle?
Itemized Deductions: Taxpayers who itemize deductions for federal and/or state		
Deductions must exceed \$12,550 Single, \$25,100 Joint, \$18,800 Head of Household, or \$12,550 Married Filing Separate to be a federal tax benefit. Deductions must exceed \$2,270 Single, \$4,545 Joint, \$3,655 Head of Household, or \$2,270 Married Filing Separate to be an Oregon tax benefit.		
Charitable Contributions. Rules require that the taxpayer retain documentation for all contributions. Taxpayers who do not itemize can still take a deduction for money donated to a 501(c)3 during 2021 of up to \$300 per taxpayer (\$600 max/return).		
Money given		\$
Noncash contributions (FMV). Clothing or household items must be in good used condition or better.		\$
If the amount above is more than \$500, you must provide details of contributions including receipts and a summary of what was donated with value assigned to each donation and your cost of items included when you obtained them.		
Did you transfer funds from an IRA directly to a charity?	Yes No	\$
Charitable Mileage	_____	Did you donate a vehicle? (If yes, attach details)

Please provide the following documentation:

All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (stock sales), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.

If you are a new client, provide copies of last year's tax returns and social security and ID for everyone on your return.

Copy of the closing statement if you bought or sold real estate.

Auto Mileage Worksheet for any vehicle expenses claimed.

Home Office Worksheet for any home office deduction allowed.

Income and deductions categorized on an attachment for business, farming and/or rental activities.

Copy of all acknowledgement letters received from charitable organizations for contributions made in 2021.

Sole Proprietor Worksheet

Copy and use separate worksheets if more than one business

Name of sole proprietor			
Business name (if different)			
Business address (if different)			
Principal business activity			
Accounting Method	Cash	Accrual	Other (specify)
Did you materially participate in this business?	Yes	No	Was the business started in 2021 ? Yes No
Do you have inventory that you resell? <i>*if yes</i>	Yes	No	Your Employer Id Number (EIN): _____ Oregon Business Id Number (OBIN): _____

Income		Expenses	
Returns and allowances (discounts)		Advertising	
*Cost of goods sold—inventory costs		Commissions & fees (describe)	
Inventory at beginning of year		Contract Labor	
Purchases (less items for personal use)		Insurance (other than health)	
Cost of labor (not paid to yourself)		Interest: Credit Cards & Loans	
Materials and supplies		Legal & Professional fees	
Other costs		Office expenses	
Inventory at end of the year		Meals with customers/vendors/staff/travel	
Other		Rent or lease: vehicles, machinery, equipment	
Did you or your spouse pay for your own health insurance? If yes, how much total in 2021		Rent or lease: Shop/Office space -not in your home	
Did you make, or plan to make, contributions to a self-employed retirement plan? If yes, how much?		Repairs & Maintenance of equipment/tools	
Did you pay any individual \$600 or more for contract labor?		Operating Supplies (not included in Cost of Goods)	
Did you pay any family members for services?		Taxes and licenses (list)	
Did you use an area of your home <i>exclusively</i> for business or storage?		Utilities	
Was the primary purpose of your business activity to realize a profit?		Wages (through Payroll)	
Has your business reported losses in prior years?		Other (attach list if necessary)	
Did you manufacture items for resale?			

Equipment Purchases. Enter the following information for assets that will last more than 1 year and cost \$500 or more.

Asset	Date purchased	Cost	Date placed in service	New or used?

Equipment Sold During Year

Asset	Date out of service	Date sold	Selling Price	Trade-in?