

Office Use Only:
IN _____
DE _____
W2 Summary _____
1099R Summary _____

2021 Tax Return Drop Off Information Sheet

Would you like a call to discuss anything in more detail? Y / N

Ph. (Home): _____ Ph (Cell): _____ Date: _____

Name: _____

Spouse: _____

Any changes in address, occupation, marital status, or dependents? Y / N

New Address: _____

Date Moved: _____ New Marital Status: _____

New Occupation: TP _____ SP _____

New Dependent or Dependent no longer on your tax return

Name: _____ SSN _____ BD _____

IF YOU HAVE A REFUND, DO YOU WANT DIRECT DEPOSIT: Y / N

Same banking as last year? Y / N Checking _____ Savings _____

ATTACH VOIDED CHECK OR COPY OF SAVINGS CARD

If not available, please enter info below

Bank: _____ RTN _____ Acct # _____

DO YOU HAVE ANY EMPLOYEE BUSINESS EXPENSES? Y / N

List amounts for **Union dues, uniforms, tools, supplies, protective clothing, mileage, required cellphone expense, internet, etc.**

In addition to cost of uniforms do you want to deduct \$400 for washing them? Y / N

Education expenses for you or your dependent? (must include Form 1098-T) Y / N

Books and supplies \$ _____

Student loan interest? Y / N \$ _____ or include Form 1098-E

Daycare expenses for dependent? (include provider statement) Y / N

The 3rd Economic Impact Payments were distributed starting March 12, 2021.

What is the amount you received for that Payment? _____

Advance Child Tax Credit Payments received between July-December, \$ _____

Self-Employed Only – There are tax credits for sick leave and family leave that is Covid related. Please check here if you would like a call to discuss eligibility. Y / N

Do you have any home improvements for the energy credit? Examples are windows, doors, insulation, heat pumps, furnaces, hot water heaters, air conditioning, certain metal and asphalt roofs, biomass stoves, solar or geothermal systems. List item and amount.

Was your health insurance obtained through Pennie.com? Y / N

If yes, then we need Form 1095-A to complete your tax return.

Do you have any bank accounts or investments held directly in a foreign country?

Y / N Value \$ _____

Cash Charitable Contributions –deduct up to \$300/Single or \$600 MFJ without itemizing \$ _____

Alimony paid or received, only if court ordered before 2019 \$ _____

In 2021, did you receive, sell, exchange or dispose of any financial interest in any virtual currency, e.g., Bitcoin, Ether, etc? Y / N

If you make Quarterly estimates list the amounts and dates paid.

Traditional Ira or Roth IRA contributions for 2021 (outside of your workplace)?

TP \$ _____ Spouse \$ _____

529 Plan contributions for 2021? List contributor, child, and amount.

Do you want us to do your Property Tax Rebate if you qualify? Y / N

Please include paid receipts for March and July of 2021

Do you owe any unpaid sales tax for internet purchases? Y / N

If yes, total of untaxed purchases requiring sales tax. \$ _____

