

Check all of the following life changes that may apply for 2021:

Bought or Sold a Home		Retired		Had a Baby	
Married or divorced		Borrowed from Retirement acct.		Home Office (Self Employed)	
Bought or Sold a Business		Became Disabled		Energy Credit Qual. Purchase	
Sold Stock		Received an Inheritance		Unemployed	

Check any of the credit or deduction items that may apply for 2021:

Daycare expenses		Real Estate Taxes-land/Home		Alimony Paid	
Medical Expenses		Unreimbursed Business Exp		Estimated Taxes Paid	
Education Expenses (1098-T)		State Taxes		Student Loan Interest	
Home Mortgage Interest		Personal Property Tax-auto, boat		IRA contribution	
Disaster Loss		Charitable Contributions		Foreign Taxes Paid	

1. How much Economic Income payment (Stimulus check) did you receive? First: \$ _____ Second: \$ _____ Third: \$ _____
2. Do you have IRS Notice 1444, Your Economic Impact Payment? (Stimulus chck) Yes / No
3. Did you, any dependents, or anyone on your behalf purchase health insurance form the Marketplace? Yes / No
 a. If yes, do you have your form 1095-A: Yes / No
4. Do you or your spouse owe the IRS or have Student Loan Debt? Yes / No
 If yes, who is the Injured Spouse(you or spouse)? _____

We prepare your return from the information you furnished us, without verification. Incorrect information will delay your refund. Keep all records in accordance with IRS requirements. Upon examination of the returns by taxing authorities, request may be made for underlying data.

I certify that all the information provided is true and accurate to the best of my knowledge.

Signature: _____ Date: _____

Signature: _____ Date: _____

Data Security Note: Scan and save this and all client provided documentation, then return to client or shred.