



If any of the following items pertain to you or your spouse for tax year 2021, please check the appropriate box and provide additional information as necessary.

PERSONAL INFORMATION:	
1. Were there any changes to your marital status or dependents during the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Did your address change during the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Could you be claimed as a dependent on another person's tax return for 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Did you have any children under age 19 or full-time students under age 24 at the end of 2021 with interest and dividend income of more than \$1,100, or total investment income of more than \$2,200?	<input type="checkbox"/> Yes <input type="checkbox"/> No
HEALTHCARE COVERAGE:	
5. Did you and your dependents have health care coverage for the full year 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No
INCOME:	
6. Did you receive any disability income?	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Did you receive or pay any alimony or separate maintenance payments under a valid divorce decree that became effective prior to 1/1/2019?	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Did you have any foreign income or pay any foreign taxes, or receive any foreign gifts?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Did you receive any installment payments on property sales that occurred prior to 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Did you have any other income that was not disclosed on forms W-2 or 1099, including unreported tip income?	<input type="checkbox"/> Yes <input type="checkbox"/> No
PURCHASES, SALES AND DEBT:	
11. Did you buy or sell any stocks, bonds, or other investment property in 2021 that is not included on any Form 1099 or escrow closing statements you will provide us?	<input type="checkbox"/> Yes <input type="checkbox"/> No
12. Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal, or fuel cell sources?	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Did you have any debts cancelled or forgiven, or did anyone owe you money which has become uncollectible? (This would include a home foreclosure or short sale or loan modification which decreased the amount of principal on your loan).	<input type="checkbox"/> Yes <input type="checkbox"/> No
14. Did you pay sales or use tax on the purchase of a vehicle, boat, aircraft, or other special item in 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No
RETIREMENT PLANS:	
15. Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
16. Did you receive qualifying Coronavirus related distributions in 2020 that you elected to include in income or repay over three years?	<input type="checkbox"/> Yes <input type="checkbox"/> No
17. Did you transfer, convert, or rollover any amount from one retirement plan to another retirement plan (including Roth)?	<input type="checkbox"/> Yes <input type="checkbox"/> No

18. Did you contribute to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
19. Did you distribute any IRA proceeds directly to charity (QCD)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
20. Do you have basis (from making non-deductible contributions) in any IRA accounts as of 12/31/20?	<input type="checkbox"/> Yes <input type="checkbox"/> No
21. Did you make any non-deductible IRA contributions this year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
ITEMIZED DEDUCTIONS:	
22. Did you work out of town for part of the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
23. If you want to claim unreimbursed mileage for business/work did you maintain mileage logs? Mileage logs are required to substantiate business/work related use of vehicles. Estimates are not allowed.	<input type="checkbox"/> Yes <input type="checkbox"/> No
24. Did you make any monetary (i.e., cash, check, credit card, etc.) charitable contributions?	<input type="checkbox"/> Yes <input type="checkbox"/> No
25. Did you make any nonmonetary (i.e., property) charitable contributions and if so, can you prove they were in good condition?	<input type="checkbox"/> Yes <input type="checkbox"/> No
ESTIMATED TAXES:	
26. Did you apply an overpayment of 2020 taxes to your 2021 estimated tax (instead of receiving a refund)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
27. If you have an overpayment of 2021 taxes, do you want the excess applied to your 2022 estimated taxes instead of being refunded?	<input type="checkbox"/> Yes <input type="checkbox"/> No
28. Did you make any IRS or state estimated tax payments for 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No
29. Do you expect your 2022 taxable income and withholdings to be significantly different from 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No
30. Are you required to pay your state taxes electronically?	<input type="checkbox"/> Yes <input type="checkbox"/> No
RENTAL PROPERTY AND BUSINESS OWNERS:	
31. Did you start a business or farm or acquire an interest in a business, entity, or trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No
32. Did you purchase or dispose of any rental, business, or farm assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to rental, business, or farm use?	<input type="checkbox"/> Yes <input type="checkbox"/> No
FOREIGN ITEMS:	
33. Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?	<input type="checkbox"/> Yes <input type="checkbox"/> No
34. Was the aggregate value of all foreign accounts in which you have authority over equal to or more than \$10,000 on any calendar day in 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No
35. Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No
36. Do you have an interest in a "specified foreign financial asset" in which the aggregate value of all such assets is greater than \$50,000? (For example, securities issued by foreign persons, interest in a foreign entity, any financial instrument or contract held for investment that has a foreign issuer or counterparty.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
37. Are you an officer, director, shareholder, or trustee or have any other interest in a foreign entity or trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No
VIRTUAL CURRENCY: The sale or exchange of virtual currencies, or the use of virtual currencies to pay for goods or services, or holding virtual currencies as an investment, generally has tax consequences that could result in tax liability.	
38. Did you hold or invest in any virtual currency during 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No

39. Did you pay for any goods or services using virtual currency in 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No
40. At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?	<input type="checkbox"/> Yes <input type="checkbox"/> No
MISCELLANEOUS:	
41. Did you receive an economic impact (federal stimulus) payment? If yes, please provide the details of the payment below. If you are unsure, you can verify the payment you received at https://www.irs.gov/coronavirus/get-my-payment . Payment Amount _____ Date (MM/YYYY) _____ <input type="checkbox"/> Payment Not Received	<input type="checkbox"/> Yes <input type="checkbox"/> No
42. Did you receive any Advance Child Tax Credit payments in 2021? If yes, please provide IRS Letter 6419, which will indicate the total amount of payments you received in 2021. (You can also view your payments at https://www.irs.gov/credits-deductions/child-tax-credit-update-portal). https://www.irs.gov/coronavirus/get-my-payment . Payment Amount _____ Date (MM/YYYY) _____ <input type="checkbox"/> Payment Not Received	<input type="checkbox"/> Yes <input type="checkbox"/> No
43. Do you (and your spouse) want to allocate \$3 to the Presidential Election Campaign Fund?	<input type="checkbox"/> Yes <input type="checkbox"/> No
44. Was your home rented out or used for business?	<input type="checkbox"/> Yes <input type="checkbox"/> No
45. Did you engage the services of any household employees?	<input type="checkbox"/> Yes <input type="checkbox"/> No
46. Did you receive a notice from or were you audited by either the IRS or a state taxing agency?	<input type="checkbox"/> Yes <input type="checkbox"/> No
47. Did you make any gifts to an individual that total more than \$15,000, or any gifts to a trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No
48. Did you purchase merchandise outside of your state of residency or over the internet where no sales tax was paid? (Some states require or request you voluntarily pay this on your income tax returns).	<input type="checkbox"/> Yes <input type="checkbox"/> No
49. Do you have an HSA account that earned any interest, dividend, capital gain or other investment income in 2021? If yes, please provide statements for 2021 as some states tax this income.	<input type="checkbox"/> Yes <input type="checkbox"/> No
50. Did you review the Tax Preparation Form and Info Request List and provide copies of all documents or related information for all income and expense items that may impact your 2021 tax return?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional questions or comments:

REQUIRED SIGNATURES:

YOUR NAME	YOUR SIGNATURE	DATE
SPOUSE'S NAME	SPOUSE'S SIGNATURE	DATE