2021 QUESTIONS

PLEASE ANSWER ALL (even if the answer is NO) & ATTACH all PERTINENT data.

NO

IN 2021, DID YOU (OR YOUR	SPOUSE)
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YES I

1	Did you receive any Stimulus Payments from the IRS in 2021 ? Indicate amount or write in ZERO, if none a. (March 2021 or later) \$ (PROVIDE IRS LETTER 1444)
2	Did you receive Advanced Child Tax Credits (If Yes, PROVIDE IRS LTR 6419)
•	Has your Marital Status Changed?
•	Did your Address Change since you filed your 2021 Return?
•	Are you being claimed as a Dependent on another person's return?
•	Are there any changes in the Dependent Information from 2021 (school, dependency, etc)
•	Do your Dependent children have Investment Income?
•	Were You and/or your Spouse a Citizen all year? (Circle which one(s))
•	Were you and/or your Spouse a Resident Alien All Year? (Circle which one(s))
•	Do you have dependents who are NEITHER U.S. Citizens nor U.S. Residents?
•	Did you pay Education Expenses for your Dependent Children?
•	Did you pay over half of the support for a parent who lived with you or lived elsewhere?
•	Did you maintain a household & pay over 1/2 the support for someone you are not claiming as a Dependent on
	your Income Tax Return (eg. Due to divorce, etc)
•	Are either you (or your spouse, if filing with a spouse) an Honorably Discharged VETERAN of the Military or
	National Guard? If so, attach DD214 if not already sent to NJ
•	Have you or your spouse or your dependents been victims of Identity Theft and been given an Identity Theft
	Protection Six Digit PIN by the IRS?
•	Receive any Income Tax Notices from the IRS or the State?
•	Were you ever Denied or Disallowed the Earned Income Tax Credit or Child Tax Credit in a Prior Year, or were
	your credits reduced in a prior year?
OREI	GN INCOME
•	Hold signature authority or an interest in a foreign bank, securities, or other financial accts?
•	Have income producing assets in a foreign country, sell foreign property, or pay foreign taxes?
•	Receive gifts in excess of \$16,815 from a foreign entity / in excess of \$100k from Foreign person?
ALES	& USE TAX
•	Make an out-of-State purchase or online for which you owe USE TAX , or other Sales Taxes ?
•	Buy a new vehicle, boat or aircraft and pay State Sales Tax? (give details)

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INCOME	<u>YES</u>	<u>NO</u>
 Have Any Other Income not included in these questions? 		
 Have Any Other Income that was NOT reported on a Tax Document? 		
Receive Unemployment Compensation		
 Receive Alimony (provide Date of Divorce Decree and amount)? 		
• Receive early distribution from IRA, 401(k), etc. (give details of use) eg, for medical expense)	?	
 Receive payments from a Long-Term Care Insurance Contract? 		
• Receive Employer provided education assistance?		
 Did you Barter your Services for goods or services from someone else? 		
 Receive Stock from a Stock Bonus Plan with your Employer? 		
• Sell any assets other than stocks & bonds?		
Purchase or sell your Principal residence, or re-finance? Attach Closing Documents)		
 Did you purchase or sell any other Residence or Property? (Attach Closing Documents) 		
 Is your home considered a Historic Home? 		
• Suffer a Foreclosure on a home or have Mortgage Debt Forgiveness, have a Short Sale, etc?		
 Receive, sell, send, exchange or otherwise acquire any financial interest in VIRTUAL CURRENCE 	Y	
Go through Bankruptcy proceedings?		
Make a ROTH conversion in 2021?		
 Make a Qualified Distribution to a Charity from a ROTH or Traditional IRA? (permanent CAA': 	L6)	
• Suffer a casualty loss of any kind or in a FEDERAL declared disaster area? Hurricane Ida?		
 Receive proceeds from a lawsuit or class action? 		
 Were you a victim of investment theft or a Ponzi Scheme? 		
Have income from installment sales?		
 Make a Loan at an Interest Rate below Market Rate? 		
 Did any security become worthless during 2021 or any debts become uncollectible? 		
 Did you exchange any securities or investments for something other than Cash? 		
Receive Hobby Income?		
Engage in any Farming activities?		
• Receive TIP Income which is not reported on Form W-2's?		
Do you do Online Gambling?		
 Anticipate a Major Change in Income or Deductions for the coming year? 		

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DEDUCTIONS FROM INCOME YES NO

•	NEW FOR 2021 - The Charitable Contribution for Non-Itemizers is \$300 for Single Filers and \$60	00 for I	Married
	Filing Joint Filers. This is now a Deduction from Taxable Income for 2021. The Contributions of	nust be	in Cash
	or Cash Equivalents. You must have substantiation for the Contributions.		
	 Did you make Charitable Donations to a Qualified 501c(3) Organization for which you 	have re	eceipts or
	cancelled checks, etc?		
•	Pay Expenses for the care of your Child or other qualifying person so you could work?		
•	Pay any Educational Expenses for yourself or your dependents?		
•	Pay any Student Loan Interest?		
•	Have moving expenses (FOR MILITARY PERSONNEL ONLY)?		
•	Make any contributions to a Keogh or a self-employed SEP, SIMPLE or Qualified Plan?		
•	Make any contributions to an IRA, or ROTH IRA, etc for 2021?		
•	Make contributions to a Medical Savings Account for 2021 (HSA, Archer MSA, etc.)		
•	Have un-reimbursed Educator Expenses? (Covid supplies qualify)		
•	Incur unreimbursed expenses as a Reservist, performing artist or fee-based govt official?		
•	Pay expenses to adopt a child in 2021 or file a Form 8839 Adoption Credit in a prior year?		
•	Pay wages to household employees (over age 18) of \$2,300 or more?		
•	Buy a new Alternative (clean) Fuel, plug-in or electric motor vehicle, etc?		
•	Perform or purchase any SOLAR or Energy Efficient Property or HOME IMPROVEMENTS?		
•	Purchase any special fuels for Non-Highway Use?		
•	Did you pay for Long Term Care Insurance?		
•	Pay Alimony (Provide Date of Divorce Decree and Amount)?		
HEALT	H COVERAGE		
•	Did you have Health Insurance Coverage at any time in 2021 ? Give details and months (B2)		
•	Did you receive Form 1095-A for 2021 regarding health coverage? Provide all copies		
OTHER			
•	Make gifts of more than \$15,000 to any individual, a trust or a Qualified Prepaid Tuition Plan?		
•	Need my Services for preparation of Estate, Gift or Inheritance Tax Returns?		
•	<u>NEW CLIENTS</u> – Have you sold business property in the last 5 years? Paid AMT in the past?		
•	INDICATE IF I CAN DISCUSS YOUR RETURN WITH Anyone elseNAME of Person		

SIGNATURES x_____ x_____ Date _____