



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

IN 2021, DID YOU (OR YOUR SPOUSE):

YES

NO



- 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? _____ _____

FOREIGN 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?** _____ _____



SALES & 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) _____ _____

Page 2q of 3

INCOME

YES NO

- 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 CURRENCY** _____
- 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'16**) _____
- 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? _____



