

2021 QUESTIONS

THE FOLLOWING QUESTIONS WERE INCLUDED IN YOUR 'SYSTEMIZER'. I CANNOT ELECTRONICALLY FILE YOUR RETURNS UNTIL YOU ANSWER THE FOLLOWING QUESTIONS FOR TAX YEAR 2021.

- 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**) YES _____ NO _____
- 2 Did you receive Advanced Child Tax Credits (If Yes, **PROVIDE IRS LTR 6419**) YES _____ NO _____
- 3 DID YOU (AND ALL MEMBERS OF YOUR TAX HOUSEHOLD) HAVE MINIMUM ESSENTIAL COVERAGE IN 2021?
(Please provide any Forms 1095-A, B, and C, if applicable). YES _____ NO _____
- 4 DID YOU RECEIVE ANY FOREIGN INCOME OR PAY ANY FOREIGN TAXES? YES _____ NO _____
- 5 AT ANY TIME DURING 2021, DID YOU (ALONE OR WITH ANOTHER) HOLD A SIGNATURE AUTHORITY OR HAVE FUNDS IN A FOREIGN BANK, FOREIGN SECURITIES OR OTHER FOREIGN FINANCIAL ACCOUNTS? YES _____ NO _____
- 6 AT ANY TIME DURING 2021, DID YOU RECEIVE ANY GIFTS OR BEQUESTS FROM A FOREIGN PERSON OR ENTITY? YES _____ NO _____
- 7 IN 2021, DID YOU MAKE AN OUT-OF-STATE OR ON-LINE PURCHASE FOR WHICH YOU OWE USE TAX, OR OWE OTHER SALES TAX? YES _____ NO _____
- 8 AT ANY TIME DURING 2021, DID YOU RECEIVE, SELL, SEND, EXCHANGE OR TOHERWISE ACQUIRE ANY FINANCIAL INTEREST IN VIRTUAL CURRENCY? YES _____ NO _____
- 9 RECEIVE **ANY OTHER INCOME** THAT HAS NOT BEEN REPORTED TO YOU ON A TAX DOCUMENT? YES _____ NO _____
- 10 DID YOU GO THROUGH BANKRUPTCY PROCEEDINGS OR SUFFER A FORECLOSURE, OR HAVE A SHORT SALE? YES _____ NO _____
- 11 ARE EITHER YOU (OR YOUR SPOUSE, if filing with a spouse) AN HONORABLY DISCHARGED VETERAN OF THE MILITARY OR NATIONAL GUARD? YES _____ NO _____
- 12 ARE YOU AND/OR YOUR SPOUSE A **CITIZEN** ALL YEAR? (circle) YES _____ NO _____
- 13 OR ARE YOU AND/OR SPOUSE A RESIDENT ALIEN ALL YEAR? (circle) YES _____ NO _____
- 14 WERE YOU EVER DENIED OR DISALLOWED THE EARNED INCOME TAX CREDIT IN A PRIOR YEAR, OR WERE YOUR CREDITS REDUCED IN A PRIOR YEAR? YES _____ NO _____
- 15 INDICATE IF I CAN DISCUSS YOUR RETURN WITH ANYONE ELSE: **NO** ____, **IF YES** ____, PROVIDE INFO

PLEASE PROVIDE ALL PERTINENT DATA TO THESE AND ANY OTHER INFORMATION YOU DID NOT INCLUDE IN THE SYSTEMIZER.

_____ Date _____ Date _____