

2021 Questionnaire

All questions pertain to activity during the year ended 12/31/2021 unless otherwise noted

<input type="checkbox"/> Taxpayer:	(check preferred contact)	<input type="checkbox"/> Spouse:
Name _____		Name _____
Occupation _____		Occupation _____
Email _____		Email _____
Cell Phone # _____		Cell Phone # _____
Home Phone # _____		
Bank Name _____	Routing # _____	Account # _____
Type of Account (circle): Checking or Savings Is it a joint account (circle): Yes or No		

What format do you prefer for your copy of the 2021 tax return? (check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> PDF via Portal only | Would you like a formal pickup meeting to review your tax return? |
| <input type="checkbox"/> Paper Copy only | <input type="checkbox"/> Not Needed <input type="checkbox"/> Virtual <input type="checkbox"/> In-person |
| <input type="checkbox"/> Portal and Paper Copy | How would you like your original docs returned to you? <input type="checkbox"/> Mail (\$10) <input type="checkbox"/> Pickup |
| <input type="checkbox"/> Paper Copy by mail (\$10 fee) | |
| <input type="checkbox"/> Portal and Paper Copy by mail (\$10 fee) | |

Personal Information

- | | Yes | No |
|---|--------------------------|--------------------------|
| Would you like for any tax refund to be directly deposited into a bank account?
Please provide voided check, if possible. | <input type="checkbox"/> | <input type="checkbox"/> |
| Would you like any taxes owed to be directly withdrawn from your bank account?
If yes, pay in full? | <input type="checkbox"/> | <input type="checkbox"/> |
| Will you possibly need a payment plan with the IRS? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any estimated tax payments towards your 2021 tax liability (outside of payroll or retirement withholding)? If yes, provide detail. | <input type="checkbox"/> | <input type="checkbox"/> |
| Would you like your 2022 estimated tax payments to be directly withdrawn from your bank account? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did your marital status change during the year?
If yes, explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| Did your address change from last year?
If yes, new address: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you or your dependents receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any stimulus payments during 2021 (Economic Impact Payment)?
How much? _____ Please provide Notice 1444-C and/or Letter 6475. | <input type="checkbox"/> | <input type="checkbox"/> |

Dependent Information

- | | | |
|--|--------------------------|--------------------------|
| Were there any changes in dependents from the prior year?
If yes, explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have any children under age 19 or a full-time student under age 24 with investment income in excess of \$2,200? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have dependents who must file a tax return? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you provide over half the support for any person(s) other than your dependent children during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay for child care while you worked, looked for work, or while a full-time student? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any advanced child tax credit payments during 2021?
How much? _____ Please provide Letter 6419. | <input type="checkbox"/> | <input type="checkbox"/> |

Self-Employed Information (Self-Employed Individuals Only)

	Yes	No
Do you have a home office used regularly and exclusively for business?	<input type="checkbox"/>	<input type="checkbox"/>
Have you provided total business mileage for 2021?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for health insurance premiums while self-employed?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a Paycheck Protection Program (PPP) loan?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did you receive PPP loan forgiveness? When? _____	<input type="checkbox"/>	<input type="checkbox"/>
During 2021, were you unable to work or telework for reasons relating to your health or to care for a family member, specifically due to COVID-19?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any income considered to be nonemployee compensation, as an independent contractor or gig worker? If yes, provide 1099's received.	<input type="checkbox"/>	<input type="checkbox"/>

Purchases, Sales and Debt Information

Did you start a new business during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange, or purchase any assets used in your trade or business?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire a new or additional interest in a partnership or S corporation?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange, or purchase any real estate during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you foreclose or abandon a principal residence or real property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire or dispose of any stock during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take out a home equity loan this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you refinance a principal residence or second home this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you lend money with the understanding of repayment and this year it became totally uncollectable? If yes, please provide loan documentation and evidence of efforts to collect.	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any debts canceled or forgiven this year, such as a home mortgage, credit cards, or student loan(s)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a qualified plug-in electric drive vehicle this year?	<input type="checkbox"/>	<input type="checkbox"/>

Income Information

At any time during 2021, did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currencies or cryptocurrencies (i.e. Bitcoin, Ethereum, Cardano, Dogecoin, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any payments for property sold prior to this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any disability income during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay or receive alimony payments, if the agreement was effective prior to 12/31/2018? If yes, date of divorce: _____	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any unemployment benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did any of your life insurance policies mature, or did you surrender any policies?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	<input type="checkbox"/>	<input type="checkbox"/>
Do you expect a large fluctuation in income, deductions, or withholding next year?	<input type="checkbox"/>	<input type="checkbox"/>

Retirement Information

Did you receive any Social Security benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an IRA, Roth, SIMPLE, SEP, 401(k), or other qualified retirement plan(s)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions, outside of your payroll, to an IRA, Roth, SIMPLE, SEP, 401(k), or other qualified retirement plan(s)? (Circle all that apply)	<input type="checkbox"/>	<input type="checkbox"/>
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2021?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to put money into a traditional IRA before April 15th to save on taxes?	<input type="checkbox"/>	<input type="checkbox"/>
Did you contribute any of your RMD directly to charity?	<input type="checkbox"/>	<input type="checkbox"/>

Education Information

	Yes	No
Did you, your spouse, or your dependents attend a post-secondary school? If yes, provide Form(s) 1098-T and qualified expense receipts.	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from or contributions to an education savings or 529 Plan account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any student loan interest this year? If yes, provide any Form(s) 1098-E.	<input type="checkbox"/>	<input type="checkbox"/>
Did you, your spouse, or your dependents take out any student loans during 2021?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?	<input type="checkbox"/>	<input type="checkbox"/>

Health Care Information

Did you enroll for Marketplace Coverage through healthcare.gov under the Affordable Care Act (a/k/a ObamaCare, Marketplace, ACA)? If yes, provide all 1095-A(s)	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to a Health Savings Account (HSA) or Archer MSA?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA this year? If yes, provide 1099-SA	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay long-term care premiums for yourself or your family?	<input type="checkbox"/>	<input type="checkbox"/>

Itemized Deductions (Answer below only if amounts exceed 2021 standard deduction amounts: Single: \$12,550, Married Joint: \$25,100, HoH: \$18,800)

Did you pay substantial out-of-pocket medical expenses (i.e. \$5,000+)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any cash or noncash charitable contributions? If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment to substantiate all contributions made.	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay real estate taxes for your primary home and/or second home?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any mortgage interest on an existing home loan? If yes, provide any Form(s) 1098 you received.	<input type="checkbox"/>	<input type="checkbox"/>
Did you incur interest expenses associated with any investment accounts you held?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any major purchases during the year (cars, boats, etc.)? If yes, please provide purchase document(s) (appliances do not qualify).	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any energy efficient improvements to your main home this year?	<input type="checkbox"/>	<input type="checkbox"/>

Miscellaneous Information

Did you gift more than \$15,000 to any individual?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any individual as a household employee during the year? If yes, did you issue any required Form(s) W-2?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive correspondence from any State or the IRS? If yes, explain or provide notice: _____	<input type="checkbox"/>	<input type="checkbox"/>
Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?	<input type="checkbox"/>	<input type="checkbox"/>

Foreign Information

Did you have any foreign income or pay any foreign taxes, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a distribution from, or were you a grantor or transferor for a foreign trust or estate?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account located in a foreign country?	<input type="checkbox"/>	<input type="checkbox"/>



Palm Harbor: 727-785-2773 Trinity: 727-569-2244 Wesley Chapel: 727-756-5300
www.PJKCPA.com