

YOUR RETURN WILL NOT BE COMPLETED IF #2 IS NOT ANSWERED

Please answer all that apply to the current tax year.

TAX YEAR 2021

TAXPAYER & SPOUSE NAME _____

BEST CONTACT PHONE NUMBER _____

EMAIL ADDRESS _____

1. If any of the following have changed since we last prepared a return for you, please fill out an Information Change Form:
Address New Dependent Remove Dependent Marital Status Death of a Spouse or Dependent
2. How much money did you receive in the **THIRD** stimulus payment between **March 12 and December 31, 2021** (maximum \$1,400 per person)? \$ _____
3. How much money did you receive Advanced Child Tax Credit paid monthly from July to December 2021? \$ _____ (Please provide the notice you received from the IRS reflecting this amount.)
4. For 2021 only, it is possible to deduct up to \$300 (\$600 for MFJ) in qualified contributions without itemizing. How much were your charitable contributions in 2021 (IRS requires documentation from the charity for one-time donations of \$250 or more)? \$ _____
5. Do you or your spouse, if applicable, have signing authority on a foreign bank account, or did you receive a distribution from, or were grantor of, or transferor to, a foreign trust?
 Yes **No**
6. Are you or your spouse, if applicable, required to repay a 2008 First Time Home Buyers Credit?
 Yes **No**
7. Did you, your spouse, or any dependents receive health insurance through a federal or state exchange (aka ObamaCare) in 2021?
 Yes **No**
If the answer is "Yes", we will need your Form 1095-A before we can complete your return
8. During 2021, did you or your spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (Bitcoin, for example)?
 Yes **No**
9. If you are due an income tax refund and would like the amount direct deposited to of have tax withdrawn from your bank account, please enter the following information:
Routing Number _____ Bank Name _____
Account Number _____ Checking Savings
10. **IF** you can claim mileage for a **BUSINESS, RENTAL, FARM, OR PARTNERSHIP**, please use our business expense worksheet. **NOTE: Unreimbursed Employee Expenses are no longer deductible.**
11. Answer the following **only IF** you had a **business, rental property, or farm**:
a. Did you make any payment in 2021 that would require you to file Form(s) 1099? Y N
b. If "Yes", did you or will you file the required Forms 1099? Y N
For more information about 1099 filing requirements and penalties, visit www.mefcpas.com.
12. Other items to discuss: _____

Please present your driver's license or state ID to the receptionist.