

NAME: _____

1) Any changes in filing status, dependents, or contact info? _____

2) Did you and/or your spouse have any interest in, or authority over, any foreign account or foreign trust at any time during the current year?
Yes _____
No _____
a) If so, what was the largest balance in the account during the year? _____

3) Did you and/or your spouse receive, sell, send, exchange, or acquire any financial interest in any virtual currency at any time during the current year?
Yes _____
No _____

4) Did you receive the Third Economic Impact Payment during 2021? Please provide IRS Letter 6475.
Yes _____
No _____

5) Did you receive Advance Child Tax Credit Payments between July and December, 2021? Please provide IRS Letter 6419.
Yes _____
No _____

6) How would you like to receive any refunds? Please provide a copy of a void check, if you have not previously.
Direct Deposit _____
Check _____

7) How would you like to pay any tax balances owed? Please provide a copy of a void check, if you have not previously.
Debit _____
Check _____

8) How would you like to receive your tax return client copy?
Paper _____
PDF _____

9) How would you like us to return your documents to you?
Pick up _____
Mail _____