



Tax Year 2021 Questionnaire

Name: _____

Best Phone # _____

Preferred E-mail Address: _____

Please review the following questions.

Please bring in supporting documents.

FAMILY INFORMATION	Circle Yes or No
1. Did your marital status change during the year?	YES NO
2. Did your address change from last year?	YES NO
3. Was there a change in dependents from the prior year?	YES NO
4. Do you have any children under age 19 or full-time student with unearned income in excess of \$2,200?	YES NO
5. Did you provide over half the support for any other person(s) other than your dependent child(ren) this year?	YES NO
6. Did you receive payments from the Child Tax Credit during July-Dec 2021? Provide Letter 6419 Amounts - Taxpayer _____ Spouse _____	YES NO
7. Did you pay for child care while you worked or looked for work? Amount of dependent care paid by your employer? _____	YES NO
8. Was anyone in your blind or disabled?	YES NO
9. Can anyone claim you as a dependent?	YES NO
10. Do you want your tax refund direct deposited? Routing Number _____ Acct Number _____	YES NO
11. If you have a refund for 2021 do you want it applied to 2022?	YES NO

INCOME INFORMATION	Circle Yes or No
1. Did you receive any income from wages or salary? Provide W-2	YES NO
2. Did you receive any income from Self- Employment? Provide 1099-Misc/1099-NEC See page 4 for organizing information	YES NO
3. Did you receive any income from the sale of real or personal property?	YES NO
4. Did you make any withdrawals from a retirement plan? Provide 1099-R Did you make any withdrawals from a retirement plan in 2020 and deferred paying taxes due to Covid?	YES NO YES NO
5. Did you receive any interest income? Provide 1099-INT	YES NO

CONTINUE TO NEXT PAGE

INCOME INFORMATION (CONT)	Circle Yes or No
6. Did you receive dividend income or sale/trade stock? Provide 1099-DIV/1099-B	YES NO
7. Did you receive any income from a Rental or Farm? Provide 1099-Misc (HUD-1 if new rental) See Page 4 for organizing information	YES NO
8. Did you receive any income from a trust, estates, partnership or S-Corp? Provide K-1's	YES NO
9. Did you receive Social Security benefits during the year? Provide 1099-SSA	YES NO
10. Did you receive any Unemployment Benefits? Provide 1099-G	YES NO
11. Did you receive any state refund? Provide 1099-G	YES NO
12. Did you receive any awards, prizes, hobby income, gambling or lottery winnings, tips, jury duty, online sales, inheritance, barter income or any other income not listed. Provide 1099-MISC or W-2G for gambling winnings including proof of any losses.	YES NO
13. Did you have any debts canceled or forgiven this year? Provide 1099-C/1099-A	YES NO
14. Did you have any foreign income or any signature authority over a financial account such as: bank account, securities account, brokerage account in a foreign country? AND/OR Hold any foreign financial accounts or assets?	YES NO
15. Did you have any Tip income not reported on your W-2?	YES NO
16. At any time in 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? (Provide Statement)	YES NO
17. Did you receive the 3 rd Economic Impact Payment EIP 3 (AKA Stimulus)? Please bring in Notice 1444-C or Letter 6475 Amount received for Taxpayer _____ Spouse _____	YES NO
18. Did you receive any income or incur expenses associated with crowdfunding?	YES NO
19. Have you received any other Income not mentioned above?	YES NO

MEDICAL INFORMATION	Circle Yes or No
1. Did you pay out-of-pocket medical expenses or premiums Health insurance (excluding Medicare) _____ Prescriptions _____ Doctors, Dentists, Hospitals, etc _____ Medical Miles _____ Lodging _____ Qualified Long Term Care (you) _____ (spouse) _____	YES NO
2. Did you make any contributions to or receive distributions from an HSA? Or Idaho Medical Savings account?	YES NO
3. Did you enroll in the Marketplace for health care coverage? Provide 1095-A	YES NO
4. Did you receive insurance from your employer? Provide 1095-B's and 1095-C's	YES NO

CONTINUE TO NEXT PAGE

ADJUSTMENTS AND DEDUCTIONS

Circle Yes or No

1. Did you contribute to an IRA, SIMPLE, SEP, ROTH, or any other retirement plan? YES NO
2. TEACHERS ONLY: Did you have any educator expense? Amount _____ YES NO
3. Did you make any charitable cash contributions? Amount _____ YES NO
Total paid to any Idaho Schools, etc _____
4. Did you make any non-cash contributions? Total _____ YES NO
Total to Idaho Youth and Rehab facilities and Educational Entities _____
5. Did you pay any student loan interest? Total _____ YES NO
6. Did you have any educational expenses during the year that you paid on behalf of yourself, your spouse, or your dependent(s)? Provide 1098-T/acct print out YES NO
7. Did you make a contribution to or receive a distribution from an Educational YES NO
8. Savings Account or Qualified Tuition Program? Provide 1099Q
9. Did you incur moving costs as a result of Active Military Duty? YES NO
10. Did you pay or receive alimony? YES NO
11. Did you purchase/refinance/sell a home in 2021? Provide HUD-1 statement YES NO
12. Did you own your own home? Provide 1098 YES NO
1st Mortgage Interest _____ 2nd Mortgage (HELOC) _____
Amount of 2nd not used to improve property _____ Property taxes paid? _____
Irrigation tax _____ Points _____ Mortgage Insurance Premiums _____
13. Did you suffer any casualty or theft loss due to a Natural Disaster? YES NO

MISCELLANEOUS QUESTIONS

Circle Yes or No

1. Do you pay any individual to work in your home on a regular basis? YES NO
2. Did you work or live out of Idaho for any part of the year? YES NO
3. Did you make any purchases without paying sales tax? YES NO
4. Did you receive any correspondence from the IRS or state? YES NO
5. Did you receive an Identity Protection PIN from the IRS? Provide CP01A Letter YES NO
6. Did you purchase a hybrid, alternative motor or electric motor vehicle? YES NO
7. Did you defer paying Self-Employment tax in 2020 due to COVID? YES NO
8. Did you give a gift to anyone over \$15,000? YES NO
9. Did you apply your overpayment of your 2020 tax return to 2021? YES NO
10. Do you have a financial interest or signature authority over a financial account or Asset in a foreign country? YES NO

ESTIMATED TAX PAYMENTS

	Date	Amount	Date	Amount
Federal Tax	Due 5/17/21 _____	_____	Due 9/15/21 _____	_____
	Due 6/15/21 _____	_____	Due 1/18/22 _____	_____

Did you Make State Estimated Payments? YES NO

CONTINUE TO NEXT PAGE TO ENTER IN SELF-EMPLOYMENT AND RENTAL INCOME/EXPENSE

SELF-EMPLOYED AND RENTAL WORKSHEETS

Self-Employed Worksheet

Gross Receipts _____

(Provide 1099-Misc and 1099-K's)

Advertising _____

Bank Fees _____

Communication _____

Health Insurance _____

Interest Paid _____

Legal & Prof Fees _____

Liability Insurance _____

Meals at Restaurants _____

Meals not at Restaurants _____

Office Supplies _____

Rent Expense _____

Repairs _____

Supplies _____

Subcontractors _____

Taxes and License _____

Travel _____

Utilities _____

Wages _____

Asset Purchases _____

Other _____

Rental Property

Property Address _____

(Provide 1099-Misc and 1099-K's)

Rental Income _____

Advertising _____

Bank Fees _____

Insurance _____

Legal & Prof Fees _____

Management Fees _____

Mortgage Interest _____

Property Taxes _____

Repairs _____

Supplies _____

Utilities _____

Yard Maintenance _____

Asset Purchases _____

Other _____

Vehicle Expense

Make of Vehicle _____

Total Miles _____

Bus Miles _____

Business Use of Home

Square Foot of Office _____

Total Sq Foot of Home _____

Daycare Hours _____ Rent _____

Insurance _____ Utilities _____

Repairs _____ Maint _____