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I-300 Individual Tax Planner Questionnaire

Taxpayer Name:

Tax Year: 2021

All new clients must fill out a new client information form. Please complete this in its entirety so that we may complete your return efficiently and put you in the best tax position possible. Please provide notes and documentation for your answers if it applies. You will need to provide a copy of your prior year's return as well as a copy of each taxpayer's drivers license or government issued photo ID.

	Question	Yes	No
1	Do you want to file your tax return electronically?	☐	☐
2	Did your marital status change during the year?	☐	☐
	Explain:		
3	Did your address change from last year?	☐	☐
	New Address:		
4	Please provide the name of the bank / routing number / account number for where you want your refund deposited, if applicable.		
	Bank Name: **Account Type:**		
	Routing #: **Account #:**		
5	Did you reside in or operate a business in a Federally declared disaster area?	☐	☐
6	Were there any changes in dependents from the prior year?	☐	☐
7	Do you have any children under age 19 or a full-time student under age 24 with unearned income?	☐	☐
8	Do you have dependents who must file a tax return?	☐	☐
9	Did you provide over half the support for any other person(s) other than your dependent children during the year?	☐	☐
10	Did you pay for child care while you worked, looked for work or while a full-time student?	☐	☐
11	Did you pay any expenses related to the adoption of a child during the year?	☐	☐
12	If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	☐	☐
13	Did you start a new business or purchase rental property during the year?	☐	☐
14	Did you sell, exchange, or purchase any assets used in your trade or business?	☐	☐
15	Did you acquire a new or additional interest in a partnership or S corporation?	☐	☐
16	Did you sell, exchange, or purchase any real estate during the year?	☐	☐
17	Did you purchase or sell a principal residence during the year?	☐	☐
18	Did you acquire or dispose of any stock during the year?	☐	☐
19	Did you refinance a principal residence or second home this year?	☐	☐
20	Did you sell an existing business, rental, or other property this year?	☐	☐
21	Did you lend money and that loan became worthless during the year?	☐	☐

	Question	Yes	No
22	Did you have any debts forgiven during the year?	☐	☐
23	Did you have any foreign income or pay any foreign taxes during the year?	☐	☐
24	Did you receive any unemployment benefits during the year?	☐	☐
25	Did you receive any disability income dining the year?	☐	☐
26	Did you receive any tip income or cash income that may of not been reported on a W-2 or 1099?	☐	☐
27	Did you receive any life insurance policy money during the year?	☐	☐
28	Did you receive any lottery or gambling winnings?	☐	☐
29	Do you expect your income or deductions to change in a material amount for the following year?	☐	☐
30	Do you actively participate in a retirement plan?	☐	☐
31	Did you receive any Social Security during the year?	☐	☐
32	Did you make any withdrawals or receive lump sums from a retirement account during the year?	☐	☐
33	Did you make any contributions to any retirement accounts during the year?	☐	☐
34	Did you, your spouse, or your dependents attend a post-secondary school during the year?	☐	☐
35	Did you have any educational expenses dining the year on behalf of yourself, your spouse, or a dependent?	☐	☐
36	Did anyone in your family receive a scholarship of any kind during the year?	☐	☐
37	Did you make any withdrawals or contributions from/to an education savings or 529 plan account?	☐	☐
38	Did you pay any student loan interest this year?	☐	☐
39	Did you and everyone in your household have qualifying health care coverage?	☐	☐
40	Did you make any contributions or receive any distributions from a Health savings account (HSA) or Archer MSA?	☐	☐
41	Did you pay any long-term health care premiums?	☐	☐
42	Did you make any contributions or receive any distributions from an ABLE (Achieving a Better Life Experience) account?	☐	☐
43	If you are a business owner, did you pay health insurance premiums for your employees this year?	☐	☐
44	Do you have any casualty or theft losses to report during the year?	☐	☐
45	Did you pay out-of-pocket medical expenses?	☐	☐
46	Did you make any charitable contributions during the year including assets or securities?	☐	☐
47	Did you pay real estate taxes for your primary or secondary home?	☐	☐
48	Did you pay any mortgage interest?	☐	☐
49	Did you use your car for business?	☐	☐
50	Do you have any job seeking expenses?	☐	☐
51	Did you personally purchase any large asset items during the year?	☐	☐
52	Do you have an office in your home that you use for your business, if you have one?	☐	☐
53	Did you retire during the year?	☐	☐
54	Do you have any moving expenses due to a change in employment?	☐	☐
55	Did you pay a household employee during the year?	☐	☐
56	Do you have any financial interest in or are a signor on any financial account that is located in a foreign country?	☐	☐
57	Do you have any foreign financial accounts?	☐	☐

	Question	Yes	No
58	Did you receive any correspondence from either the IRS or any state taxing authority?	☐	☐
59	Did you receive any loan forgiveness for either commercial loans or government loans such as PPP monies? **(Please provide forgiveness documents)**	☐	☐
60	How much, if any, did you and your spouse, if applicable, receive in government stimulus payments for the tax year currently filing?		
61	How much, if any, did you and your spouse, if applicable, receive in advanced child tax credit payments for the tax year currently filing?		
62	Do you have any balances owed on any prior year's returns?	☐	☐
63	Did you make any estimated tax payments for the year for either Federal or any states? **(Please provide dates, tax authority, and amounts below)**	☐	☐

General Engagement Understanding

Please read this section carefully as you have responsibilities around the bookkeeping and tax services we are engaged in providing you, the client.

All bookkeeping and tax preparation services are completed based on unaudited information provided by you, the client. We do not examine your information or provide audit or attestation services. You are responsible for making sure the information is true and accurate. We may, during our services, need to adjust our fees based on the workload your bookkeeping or tax preparation requires. We will discuss any proposed fee changes with you. You agree to provide us with all the necessary information to complete the services engaged promptly. You affirm that all information is true and accurate and that we may request additional information or clarity at our discretion. You are responsible for providing explanations or further support for any information used to complete your bookkeeping or tax preparations. Please be sure to review any bookkeeping and tax documents before accepting or signing.

Our work requires us to collect personal information about you from several sources. We will be able to see personal and financial information from your support and specific 3rd party sources. Accepting our services authorizes us to obtain such information as necessary to perform the work required, and you hereby authorize us to do so. We have privacy policies and a data protection plan to protect your information and we will not share any information unless required by law or authorized by you in writing. Please visit our website for more information about how we protect your data.

Comments