

KMG Tax 2021 Income Tax Questionnaire

The purpose of this questionnaire is to prepare information for your tax return appointment and to update changes. For new clients, please complete this form in its entirety. Returning clients, please update any changes from the previous tax year(s). All clients can bring this form to your tax appointment or email the form to kgerrity@kmgtax.com (**do not fill in social security number if emailing form back!**) or bring with you to your tax appointment. Please contact our office if you have any questions.

Taxpayer (name & social security number)	
Spouse (name & social security number)	
Address:	

Contact information:

Taxpayer email _____ Phone _____ ☐ Cell ☐ Home ☐ Work

Spouse email _____ Phone _____ ☐ Cell ☐ Home ☐ Work

Date of birth: Taxpayer _____ Spouse _____

Did you buy, sell or trade **virtual currency** in 2021? Yes _____ No _____

2021 Advance Child Tax Payment:

Amount received _____ Include Letter 6419

2021 Stimulus Payment (Recovery Rebate)

Amount of third payment received _____

Health Insurance Coverage

Covered entire year? Yes _____ No _____ Months not covered _____

Include form 1095-A Marketplace Insurance, 1095-B or 1095-C for employer or private insurance.

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Dependents

Name (First, Middle, Last)	Date of birth	Social Security number	relationship	Student Yes or No	Months lived with you

Income: if any of the following apply please check off and include:

- ☐ Wages: Form w-2 for all jobs
- ☐ Miscellaneous income: Form 1099NEC or 1099MISC
- ☐ Interest earned, Stock sales and Dividends received 1099-B and 1099-DIV
- ☐ Pension and IRA distributions: Form 1099-R for all distributions
- ☐ Social Security:
- ☐ Unemployment income: include 1099-G

Did you receive a state refund for 2021? Yes _____ No _____

If yes, amount _____

Child and dependent care:

Did you pay for child care while working?

Provider _____ EIN or Social Security of provider _____

Address _____

Amount paid _____

Employer reimbursement _____

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Tuition for yourself and/or dependent

Student(s) name _____ Month and year school started _____

Scholarship received? _____

Include 1098T; if not available, include amount of tuition and books paid, EIN of institution and address

Out of pocket medical and insurance expenses

Include amount of medical, dental and vision expenses; if a mileage log of medical travel was completed, please include mileage.

Property Tax or Rent Paid _____

Mortgage interest and PMI

Please include 1098-INT

If you sold a home (or second home) in 2021, please include form 1099-S.

Date former home was purchased _____

Sale date of former home _____

Original purchase price _____

Capital improvements to former home _____

Sale price of former home _____

Attorney fees, commissions – please include Closing Disclosure from sale

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Donations

Cash, other than political organizations

Amount _____ Name of organization _____

Other than cash

Amount _____ Name of organization _____

IRA contributions

Amount _____ Traditional _____ Roth _____

Current balance: Roth IRA _____ Traditional IRA _____

Please include form 5498 if received

Business/Rental Income

If you have business/rental income, please include any 1099NEC or 1099MISC received or amount of business/rental income. We will discuss deductions for your business/rental.

Miscellaneous Income

Please include any other income, such as lottery winnings, jury duty..

Future financial planning

As our personal situations change, so does our need to plan for these changes. Births, adoptions, divorce, deaths, career changes, to name a few, may all change the financial course we are currently on. If you would like to discuss such future planning, please feel free to contact our office.

Thank you for your business. Wishing you all the best for 2022.