

**Jupiter CPA, Inc. 2021 Questionnaire\***

**Please fill in the appropriate Circle and INCLUDE ALL THE NECESSARY DETAILS AND DOCUMENTATION\*\***

YES  NO Did you receive a 3rd stimulus payment during 2021? If so, how much did you receive? \$ \_\_\_\_\_

YES  NO Did you receive the advanced payment of the Child Tax Credit at any time from July through December 2021? Provide Form 6419

**Personal Information:**

YES  NO Did your marital status, home address, contact, or banking information change within the past year?

YES  NO Could you be claimed as a dependent on someone else's return for 2021? If yes, list: \_\_\_\_\_

YES  NO Did you receive correspondence from the state or IRS? Please provide a copy.

YES  NO If you have an overpayment of taxes would you like to apply them to estimated payments or refund a check or direct deposit?

YES  NO Did you make any estimated payments during the year? If yes, Amount: \$ \_\_\_\_\_ Date: \_\_\_\_\_

**Dependent Information:**

YES  NO Were there any changes in dependents, and did they earn money and file their own tax return? If yes, explain

YES  NO Did you provide over half the support for any other persons other than your dependent children during the year? If so, who?

YES  NO Did you pay for childcare while you worked, looked for work, or while a full-time student? If yes, provide receipts and EIN

YES  NO Are you divorced or separated with child(ren) (within the past year); do you have a finalized divorce decree?

**Purchases, Sales, and Debt Information:**

YES  NO Did you start, sell, or purchase a business or rental property during 2021? If so, provide documents.

YES  NO Did you acquire or lose any stock this year? Provide realized gains/losses.

YES  NO Did you purchase, sell, or refinance a principal residence or second home this year? If so, provide closing documents.

YES  NO Did you have any debts canceled or forgiven this year, such as, home mortgage or student loans? \*\*

YES  NO Are you owed money which became uncollectable or incurred a loss because of damage or stolen property?

**Income Information:**

YES  NO Did you receive unemployment or disability benefits/income this year? Provide disability/income or 1099-G

YES  NO Did you make or receive a gift for more than \$15,000 to or from anyone?

YES  NO Did you receive any awards, prizes, hobby income, gambling, or lottery winnings?

YES  NO Did you pay or receive alimony due to divorce? If so, how much?

**Retirement Information:**

YES  NO Did you receive any Social Security benefits during the year? Provide SS statement

YES  NO Did you receive any payments(lump sum or regular) from a pension, profit sharing or 401(k) plan? Provide 1099-R

YES  NO Did you make contributions to an IRA, Roth, Keogh, Simple, SEP, or other qualified retirement plan? How Much?

**Education Information:**

YES  NO Did you, your spouse, or dependents attend a post-secondary school during the year? Provide 1098-T

YES  NO Did you pay any student loan interest this year? Provide 1098-E

**Health Care Information:**

YES  NO Did you enroll in Marketplace Coverage through healthcare.gov? Please provide any Form(s) 1095-A

YES  NO Did you make any contributions to a Health savings account (HSA) or Archer MSA?

YES  NO Did you receive any distributions from a HSA, Archer MSA, or Medicaid Advantage MSA this year?

**Miscellaneous Information:**

YES  NO Did you receive an Identity Protection PIN from the IRS, or have you (or a dependent) been a victim of Identity Theft? \*\*

YES  NO Did you want a copy of your return emailed to you? E-mail: \_\_\_\_\_

YES  NO Did you use fuel for any off-road business or commercial Fishing? Provide receipts

YES  NO Did you engage in a transaction involving virtual currency in 2021?

**Itemization:If you can overcome the standard deduction(Married filing jointly\$25,100, Single filer \$12,550.00) see the following-**

YES  NO Did you pay long-term care premiums for yourself or your family?

YES  NO Did you make any cash or non-cash charitable contributions (clothes, furniture, etc.)? Attach totaled receipts.

YES  NO Did you use your vehicle on the job, other than commuting? Provide mileage.

YES  NO Did you work out of town for part of the year? Provide receipts.

YES  NO Did you utilize an area of your home for your business?

YES  NO Did you make any major purchases during the year (including cars, electric vehicles, boats, etc.)? Provide Bill of Sale.

YES  NO Did you pay state or local real estate property taxes this year? How much? \$ \_\_\_\_\_ When?