

# Questions—All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse—enter "?" if unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?			
	Yes	No	Did you pay or receive alimony in 2021?		Recipient's SSN	Date of divorce or separation
			Paid Received \$			
	Yes	No	Did you purchase health insurance through a public exchange?			
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?			
	Yes	No	Did you pay anyone for domestic services in your home?			
	Yes	No	Did you purchase a new energy-efficient car, truck, or van?			
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?			
	Yes	No	Are you a member of the military?		State of residency	
	Yes	No	Were you a citizen of or lived in a foreign country?		Foreign country	
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? Balance exceeds \$50,000 Yes No			
	Yes	No	Did you receive any economic impact payments (stimulus payments) during 2021? If yes, provide the amount(s) and dates received.			
Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS?				
		Designee's name		Phone number	PIN (any five digits)	
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2021? (Provide statement for other expenses.)			
	Yes	No	Did you receive any advance Child Tax Credit payment? If yes, enter the amounts on last page. (Attach Letter 6419.)			
	Yes	No	Were any children attending college?	Year in college	Paid by you: Tuition \$	Student loan interest \$ Books \$
					Paid by student: Tuition \$	Student loan interest \$ Books \$
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?			
			Student		Amount paid \$	
			Name and address of school			
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (add statement if needed)			
			Name of provider		EIN or SSN	
			Address		Amount paid \$	
Yes	No	Do you have any children who have unearned income of \$1,100 or more?				
Yes	No	Did you make any contributions to a 529 plan in 2021?				
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2021?			Traditional IRA Roth IRA
	Yes	No	Did you roll over any amounts from a retirement account in 2021?			
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?			
	Yes	No	Did you receive any income from an installment sale?			
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2021?			
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2021?			
	Yes	No	Did you receive, sell, send, exchange, or otherwise dispose of any financial interest in any virtual currency?			
DEDUCTIONS	Yes	No	Did you, or do you plan to, contribute money before April 18, 2022 to an HSA for 2021? If yes, provide details.			
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.			
	Yes	No	Did you pay sales taxes on a major purchase in 2021, such as a vehicle, boat, or home?			
	Yes	No	Did you make any charitable contributions in 2021? If yes, provide details.			
BUSINESS	Yes	No	Did you work from a home office or use your car for business?			
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?			
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?			
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.			
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.			
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.			
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.			
State information		Full-year resident	Part-year resident	Nonresident	School district	
States of residence during 2021 and dates				Do you rent or own your home? Rent Own		