**2021 New Client Questionnaire**

Last Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Primary Contact:**

Taxpayer 1

Taxpayer 2

Taxpayer 1’s First Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SSN:\_\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_\_\_\_

Taxpayer 2’s First Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SSN:\_\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_\_\_\_

Primary Contact’s Phone: (\_\_\_\_\_\_\_\_) \_\_\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Primary Contact’s Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ , WI , \_\_\_\_\_\_\_\_\_\_\_\_

* Did you pay any estimated taxes? Yes No

*(If yes, we need dates and amounts. Please attach paid vouchers or include in notes section on the backside*)

* What was the amount of the 3rd stimulus check received in 2021? $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Funds were generally dispersed around 3/17/2021 & each person would have received $1,400)*

* Did you have a change in your marital status in 2021? Yes No

*(If so, what changed? Please include divorce date, if applicable. There’s space for extra notes on the backside)*

* Dependent status: I’m a dependent I’m claiming dependents this tax year N/A

*(Please list ALL dependents’ names, SSNs, and dates of birth in the notes section on the backside)*

* Did you receive the Child Advance Credit?

Received (Jul-Dec) Received (Jul-\_\_\_\_\_\_) Opted out N/A

*paper*)

*paper*)

*(If you received any payments, how much per month was received?)* $*\_\_\_\_\_\_\_\_\_\_\_\_\_*

* Do you own your primary home or rent? Own Rent

*(If you own, include real estate tax bill, paid receipt and Form 1098 Mortgage Interest)*

**\*If you made less than $24,680, be sure to get a rent certificate filled out by your landlord(s).**

*(If you rent, fill out rent amount below)*

Rent amount per month $ \_\_\_\_\_\_\_\_\_ X No. of months \_\_\_\_\_\_

Was heat included in your rent? Yes No

* Did you have Social Security Income? Yes *(need SSA Form)*  No

* Did you have Unemployment Income? Yes *(need 1099-G)* No
* Did you have student loan interest? Yes *(need 1098E)* No
* Did you pay child care or private school tuition? Yes No

*(For daycare, we need facility name, Federal ID#, address, and amount paid for each child.*

*For private school, we need the tuition statement including what grade the child is enrolled in)*

* Did anyone attend college last year? Yes No

*(If yes, we need 1098T and any Edvest or 529 Plan forms and please fill in information below)*

Has this student been consistently enrolled since they first enrolled? Yes or No

When did the student first enroll? Season: \_\_\_\_\_\_\_\_\_\_\_\_ Year:\_\_\_\_\_\_\_\_\_\_\_\_\_

* Who supplied your health insurance?

Plan through employer Marketplace/ Obamacare Neither

*(If you were covered through Marketplace/ Obamacare, we need form 1095-A)*

* Did you have supplemental health insurance or long term care insurance?

Supplemental Long term care Neither

*(Please include amounts paid for each type of insurance, split by each taxpayer)*

* Did you have any income from ownership of a business, rental property, or farm?

Yes, I have a schedule C, E, or F Yes, I’m a shareholder/partner No

*(Please include income & expenses for schedules C, E, or F and last year’s depreciation schedule.*

*For shareholders/partners, we need K-1(s))*

**Direct Deposit Information:**  Paper Check Requested

Bank Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Routing No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Checking Savings

Do we have permission to pay on your behalf if you owe for either Federal or State? Yes No

*(Funds will be deducted from the account listed above and you will be notified of payment)*

**Driver’s License Information Needed**! We will photocopy for you or write down:

T/P-1: Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_ Issue Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Expire Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_

T/P-2:Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_ Issue Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Expire Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_

**Extra notes you’d like for us to know/ watch for:** *(e.g. purchase or sale of home, passing of spouse, etc.)*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**\*\*Please make sure you have included a copy of last year’s tax return\*\***