



2022 Client Questionnaire (For 2021 Tax Year)

(to be answered by all clients – *please print neatly*)

Client Information

Name: _____ **I have a new address** | Write address below:
Legal Name (If Different): _____ (*cannot be P.O. Box*) _____
Email: _____
Phone: _____ (Home / Mobile) | Secondary phone: _____ (H / M / Work)

Spouse Information (if applicable)

Name: _____ **I have a new address** | Write address below:
Legal Name (If Different): _____ (*cannot be P.O. Box*) _____
Email: _____
Phone: _____ (Home / Mobile) | Secondary phone: _____ (H / M / Work)

To be provided by *All* Clients, each year

- Legible copy of your **unexpired driver license** (front and back) (your spouse's, too, if applicable!)
- Blank voided check** to be used to deposit refund or debit balance due

To be provided by New Clients, first year

- Copy of **Social Security card(s)** for each individual who will be included on the tax return
- Dates of birth** for each individual who will be included on the tax return
- Copies of **the last two years tax returns**

IRS Requirements

- If you normally receive the **Earned Income Tax Credit (EITC)**, please provide documentation showing your dependent(s) reside at your address (e.g. medical EOB, school report card, daycare receipt, etc.)
- If you have children and qualify for the **Child Tax Credit (CTC)**, please provide documentation showing your dependent(s) reside at your address (e.g. medical EOB, school report card, daycare receipt, etc.)
- If you have children in college and qualify the **American Opportunity Tax Credit (AOTC)**, you must provide **Form 1098-T**, the college invoice for each semester attended, *and* proof of payment for each semester
- If you will use the **Head of Household** filing status, we must have in our files copies of the **birth certificates** for each of your children (You only need to provide these one time)

Questions for All Clients

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Any change in filing status in the past year? <i>If yes</i> , was your change due to: <input type="checkbox"/> Marriage <input type="checkbox"/> Divorce <input type="checkbox"/> Separation <input type="checkbox"/> Death of spouse <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<input type="checkbox"/>	Have you added or lost any dependents in the past year? <i>If yes:</i> <input type="checkbox"/> Added _____ dependent(s). Total number of dependents: _____ <input type="checkbox"/> Lost _____ dependent(s). Total number of dependents: _____
<input type="checkbox"/>	<input type="checkbox"/>	Any change in housing & real estate in the past year? <i>If yes</i> , please select the appropriate box: <input type="checkbox"/> Bought a house <input type="checkbox"/> Sold a house <input type="checkbox"/> Moved/relocated <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive health care from the exchange in the past year? <i>If yes</i> , then Form 1095-A (Health Insurance Marketplace Statement) is required.
<input type="checkbox"/>	<input type="checkbox"/>	Do you have any investment accounts (e.g. E*TRADE, Robinhood, TD Ameritrade, etc.)?
<input type="checkbox"/>	<input type="checkbox"/>	Do you have any foreign bank accounts or foreign financial assets ?
<input type="checkbox"/>	<input type="checkbox"/>	Did you sell, send, exchange, or acquire any virtual (aka crypto) currency during the past year?
<input type="checkbox"/>	<input type="checkbox"/>	Have you received correspondence from the IRS or any state? Please provide copies!

Questions Specific to the 2021 Tax Year

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Did you (and/or your spouse, if married), receive the Economic Impact Payment ("stimulus") #3 (Spring 2021)? <i>If yes</i> , please provide IRS Letter 6475 (Your Third Economic Impact Payment) <i>If you cannot find this letter, please provide your 2021 IRS Account Transcript from https://www.irs.gov/individuals/get-transcript</i> Note: <i>If married, each spouse will receive a separate letter and we will need both.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Did you (and/or your spouse, if married), receive any Advanced Child Tax Credits (July 2021 - December 2021) <i>If yes</i> , please provide your IRS Letter 6419 (2021 Total Advance Child Tax Credit (AdvCTC) Payments) <i>If you cannot find this letter, please provide your 2021 IRS Account Transcript from https://www.irs.gov/individuals/get-transcript</i> Note: <i>If married, each spouse will receive a separate letter and we will need both.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive Unemployment benefits ? <i>If yes</i> , you must obtain and provide Form 1099-G from the NYS website
<input type="checkbox"/>	<input type="checkbox"/>	Self-Employed only: Did you have COVID-19 or did you need to take care of family members because of COVID-19? <i>If yes</i> , you will need to provide details pertaining to the circumstances.

Please see our "**What Should I Bring?**" page on our website for a helpful list of items we need:

<https://freedomfs.net/what-should-i-bring>