

# Blackford CPA 2021 Tax Year Individual Checklist

Date: \_\_\_\_\_

Taxpayer's Name and BDate: \_\_\_\_\_

Spouse's Name and BDate: \_\_\_\_\_

Phone#: \_\_\_\_\_

Primary Email Address: \_\_\_\_\_

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

\_\_\_\_\_

Please list the following information for dependents you can claim for this tax year:

Legal

Name: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Legal

Name: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

If you receive a refund, would you like the funds directly deposited into your account? If yes, please provide details below. Let me know if you want your refund applied to next year.

Name of Financial Institution: \_\_\_\_\_

Bank Account Number: \_\_\_\_\_

Account Routing Number: \_\_\_\_\_

Please list all Estimated Taxes Paid for 2021:

1<sup>st</sup> Quarter: Amount Paid \$ \_\_\_\_\_ 2<sup>nd</sup> Quarter: Amount Paid \$ \_\_\_\_\_

3<sup>rd</sup> Quarter: Amount Paid \$ \_\_\_\_\_ 4<sup>th</sup> Quarter: Amount Paid \$ \_\_\_\_\_

1: Did you get an Economic Impact Payment (Third Round)? \_\_\_\_\_

How much was it? \_\_\_\_\_

2: Are you or were you on the Health Insurance Marketplace?

Did you get your 1095 for this year?

3: Did you pay any education expenses for yourself or your child?

If Yes provide the 1098T from the educational institution.

4: Did you pay daycare expense for your dependents?

If Yes: how much and what is the daycare's Name and EIN?

5: Do you own property other than your primary residence?

6: Did you contribute to an IRA or a ROTH IRA?

Would you like to?

7: Did you buy, sell or refinance any real property (primary home or other real estate)?

8: Do you have any foreign bank accounts with more than \$10K or more than \$50K?

9: Did you buy a new energy efficient air conditioner or windows or solar equipment?

10: Did you engage in any transactions using virtual currency?

11: Is there anything different in your tax life this year than last year? Please explain.

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