

Printed copy w/folder

Client Information Sheet

Electronic/scanned copy

Please complete all lines

Texting Service Yes No

Name

Phone H - _____

C - _____

taxpayer

C - _____

spouse

Street

Email (T) _____

Town State Zip

(S) _____

Please answer all Questions

(personal email preferred)

Yes No

- 1) Was health insurance purchased on the exchange – Access Health – if so, need form 1095
- 2) Any foreign bank accounts - if yes, and balance is over \$10,000 need statements
- 3) Any purchases made online where sales tax was not paid but would have been paid if bought in CT
- 4) Any CHET (CT Higher Education Trust) contributions or distributions
- 5) Any energy credit improvements – water heater, furnace, windows, insulation, exterior doors solar panels, HVAC – (lifetime maximum credit of \$500)
- 6) At any time did you receive, sell, send, or exchange any virtual currency – (bitcoin etc)
- 7) Has there been a change in marital status
- 8) Do you have an HSA – Health Savings Account – need forms 1099-SA and 5498-SA
- 9) Did you receive any unemployment during 2021 – we need UC-1099G
- 10) Did you receive a stimulus payment in 2021 – need amount and IRS letter \$ _____
- 11) Did you make any cash/check charitable contributions? – Anyone can claim up to \$600 without itemizing \$ _____ - it is a deduction on the front page.
- 12) Did you, your spouse or dependents have qualified education costs or student loan interest
- 13) Did you receive monthly advanced child credit payments? Yes No
need amount and IRS letter \$ _____
- 14) Did you make any estimated payments for 2021 – need dates and amounts
- 15) N/A - Are there any changes in claiming dependents for 2021
- 16) N/A - Please provide your bank account information if you want direct deposit
Bank _____ Routing # _____ A/C # _____
- 17) Business owners – Did you receive a 2nd Paycheck Protection Program (PPP) Loan \$ _____

Please add comments and questions on reverse side

