

2021 CLIENT QUESTIONNAIRE

Economic Impact Payments and claiming the Recovery Rebate Credit:

- Individuals who didn't qualify for the 3rd Stimulus Payment or did not receive the full amount may be eligible for the Recovery Rebate Credit based on their 2021 tax information.
- These payments were generally \$1,400 per individual.
- This was usually received in March 2021. Find this amount on Notice 1444-C or IRS letter 6475

Enter the amount, if any, of the 3rd Economic Stimulus Payment received. \$ _____

Advance Child Tax Credit Payments:

- Taxpayers with children may have elected to receive an advance of the 2021 Child Tax Credit.
- Eligible families who did not get monthly advance payments in 2021 can still get a lump-sum payment by claiming the child tax credit when they file a 2021 federal income tax return.
- These were monthly payments from July to December 2021. \$300 for children under 6. \$250 for children ages 6-17

Enter the amount, if any, of the Advance Child Tax Credit payments received by the Taxpayer _____, Spouse _____. Find this amount on IRS letter 6419.

Taxpayers can claim a deduction of up to \$300 (married \$600) for cash donations made to 501(c)(3) charitable organizations during 2021 without itemizing. It must be cash, check, or credit card donations with receipt.

- I/We made cash/check donations, and have receipts, totaling \$ _____.
- I/We did not make any cash/ donations to charity in 2021.

Did you receive, sell, send, exchange, or otherwise dispose of any financial interest in any virtual currency in 2021?

YES NO

Did you receive healthcare through the ACA/Marketplace/Obamacare at any time in 2021? YES NO

If yes, you must include Form 1095A.

Did you purchase a qualifying plug-in electric drive motor vehicle in 2021? YES NO

If yes, please provide the receipt, year, make, model, VIN, and date of purchase below:

Did you make any energy saving improvements to your home in 2021? YES NO

Specifically: windows, doors, insulation, hot water heater, heat pump, solar items: If yes, provide amount/details below:

At any time during 2021, did you or your spouse have signature authority over any foreign bank/investment accounts totaling \$10,000 or more? If yes, you will need to prepare an FBAR through FINCEN. These accounts might be family owned, but you are able to sign. This might include Gambling & Fantasy Sports accounts.

YES NO

If your address, phone #, email has changed, or are claiming different dependents than last year, please provide details:

All information given to Kembel Tax Service on this form and other information given pertaining to the preparation of this income tax return is true to the best of my knowledge. The responsibility for proof of reported income and any other expenses falls solely on the taxpayer.

Taxpayer Signature: _____

Spouse Signature: _____