

**Curran's Tax Service**

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**CLIENT INFORMATION SHEET****TAX YEAR 2021****PAGE 1****YOUR INFORMATION**

Your Full Name

Social Security Number

Birth Date

Occupation in 2021

**SPOUSE'S INFORMATION**

Spouse's Full Name

Social Security Number

Birth Date

Occupation in 2021

**ADDRESS & CONTACT INFORMATION**

Address

City

State

Zip

Best Phone

Best time to call

Email Address

County of Residence January 1, 2021

**Please provide DL for ease in State filings and identity protection.****US Citizen/Resident Alien/Non-res. Alien**  
**\*Please Circle That Which Applies\*****FILING STATUS**

Marital status at the end of 2021

☐

Single

☐

Married

☐

Divorced: year

If married, did you live apart from your spouse during the last 6 months of 2021?

☐

Yes

☐

No

By answering "Yes," you are confirming that if requested by the IRS, you can provide documentation that verifies your spouse did not live with you during the last 6 months of the year, such as a lease agreement, utility bills, a letter from a clergy member, or a letter from social services.

Can you be claimed as a dependent on someone else's tax return?

☐

Yes

☐

No

Did you pay for over half the cost of keeping up your home during 2021?

☐

Yes

☐

No

Upkeep expenses include rent, utilities, food eaten in the home, mortgage interest, real estate taxes, and insurance on the home. If you use payments you received under any public assistance program to pay for part of the cost of keeping up your home, you cannot count them as money you paid. However, you must include them in the total cost of keeping up your home to figure if you paid over half the cost.

By answering "Yes," you are confirming that if requested by the IRS, you can provide documentation that verifies you paid for over half the cost of keeping up your home, such as rent receipts, utility bills, grocery receipts, and other household bills.

**DEPENDENTS**

First Name	Last Name	Birth Date	Social Security Number	Relationship to You	# Months Lived with You 2021	Claiming for 2021?

If requested by the IRS, can you provide documentation that shows evidence of the relationship between you and each of your dependents listed above (birth certificates, marriage certificates, court documents, letters from authorized placement agencies, etc.)?

☐

Yes

☐

No

If requested by the IRS, can you provide evidence that each of your dependents lived with you for the number of months stated above during 2021 (school, medical, childcare provider, social service records, etc.)?

☐

Yes

☐

No

☐

I have daycare expenses

Care provider name &amp; Fed ID #

If you are claiming a dependent child on your tax return, in order for us to meet certain requirements set forth by the IRS, you are required to accurately and thoroughly answer all questions listed below. If applicable, be sure to provide a detailed explanation for each child you are claiming. Your tax preparer will review each question that pertains to your situation during the preparation of your tax return.

Are you claiming a child who was between 19 and 23 years of age at the end of 2021 and a full-time student for any part of five calendar months during 2021? If yes, please list the educational institution and the months attended by the child as a full-time student.

☐ Yes ☐ No If "Yes", which ones?

\_\_\_\_\_ Year in College (Freshman, Sophomore, etc) 1098T req.

Was a student convicted of a felony for possession or distribution of a controlled substance in 2021?

☐ Yes ☐ No

Are you claiming a child who is permanently and totally disabled? If requested by the IRS, can you provide documentation that verifies the child is permanently and totally disabled, such as a note from a doctor, healthcare provider, or social service program?

☐ Yes ☐ No

Did any of the dependents you are claiming earn more than \$4200 in wages in 2021?

☐ Yes ☐ No If "Yes", which ones?

Can anyone else claim any of your dependents? \* Indicate if someone else can claim any of your dependents for Earned Income Credit

☐ Yes ☐ No If "Yes", which ones?

Will they try to claim this dependent? ☐ Yes ☐ No

Are you claiming a child who lived with any other adult relative, including other parent for more than half the year during 2021? If yes, please list each adult relative who lived in the same home as the child for more than half the year, their relationship to the child. **TIE-BREAKER RULES MAY APPLY**

☐ Yes ☐ No

Are you claiming a child who is not your own son or daughter? If yes, please explain why the parents of the child are not claiming the child.

☐ Yes ☐ No \*Proof of residence may be required\* Please make note of step-children.

Have you ever had Earned Income Credit, Child Tax Credit, Additional Child Tax Credit, or American Opportunity Credit disallowed or reduced in a previous year? Have you filled out the required recertification form?

☐ Yes ☐ No

**EIC CANNOT BE CLAIMED UNLESS CHILD RELATIVE LIVED WITH TP MORE THAN HALF THE YEAR**

## TAX PREPARER'S NOTES

The shared responsibility payment has been reduced to "\$0" (zero) for all taxpayers. Form 8965 is no longer used and no health insurance information will be shown on the tax return unless the taxpayer received Form 1095-A from the marketplace.

If any person listed on this return had healthcare coverage through the marketplace (Exchange) for even one month of 2021, please submit form 1095-A.

## RECEIVING YOUR REFUND

If you are due a REFUND would you prefer      Check mailed to my address      Direct deposit to my bank

Bank Name \_\_\_\_\_ Checking

Routing # \_\_\_\_\_ Account # \_\_\_\_\_ Savings

## DURING 2021, DID YOU OR YOUR SPOUSE...

☐ Live or work in any other states? If yes, please explain: \_\_\_\_\_

Receive any of the following?

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Wages or salaries            | <input type="checkbox"/> Gambling winnings                           | <input type="checkbox"/> Self-employment, Farm income or a 1099-MISC |
| <input type="checkbox"/> Unemployment compensation    | <input type="checkbox"/> Pension, annuity, IRA, or retirement income | <input type="checkbox"/> Virtual Currency- Bitcoin or others         |
| <input type="checkbox"/> Social Security benefits     | <input type="checkbox"/> Interest on savings or stock dividends      | <input type="checkbox"/> Rental Income – Received from a relative?   |
| <input type="checkbox"/> Disability from Insurance/VA | <input type="checkbox"/> Cancellation of debt by a lender            | <input type="checkbox"/> Yes <input type="checkbox"/> No             |

• Do you have any other world-wide income you need to report?

• Do you have signature control of any foreign accounts with a balance of \$10,000 or more?

Make payments for any of the following?

- |   |   |
|---|---|
| <input type="checkbox"/> Real estate taxes                | <input type="checkbox"/> Student loan interest              |
| <input type="checkbox"/> Home mortgage                    | <input type="checkbox"/> College tuition                    |
| <input type="checkbox"/> Charitable donations             | <input type="checkbox"/> Vehicle excise tax _____           |
| <input type="checkbox"/> Fed estimated taxes Per Quarter: | <input type="checkbox"/> State estimated taxes Per Quarter: |

**RENTERS:** Rent you paid per month \_\_\_\_\_  
Number of months in 2021 \_\_\_\_\_  
Landlord Name & Address \_\_\_\_\_

Other

☐ Do you/your spouse have a Health Savings Account? (HSA) Family or individual plan? Were all withdrawals for Medical Expenses? \_\_\_\_\_

PLEASE PROVIDE NOTICE 1444C and 6419 AMOUNT RECEIVED 3<sup>RD</sup> PAYMENT \_\_\_\_\_ ACTC \_\_\_\_\_

## BUSINESS USE OF AUTOMOBILE MILEAGE

When did you place your vehicle into service for business purposes? Year \_\_\_\_\_

Enter miles in appropriate spaces Business \_\_\_\_\_ Personal \_\_\_\_\_ Commute \_\_\_\_\_

Was your vehicle available for use during off duty hours? YES NO

Do you or your spouse have another vehicle available for personal use? YES NO      Do you have written evidence to support your deduction? YES NO

\*\*\*\*PLEASE PROVIDE ALL DOCUMENTATION ON ANY PPP LOAN APPLICATIONS AND FORGIVENESS APPLICATIONS.

We will prepare your Federal and State income tax returns using information that you provide.  
We may ask for clarification of some items, but we will not audit or otherwise verify the information you give to us.

#### YOUR RESPONSIBILITIES

It is your responsibility to provide all the information required for the preparation of complete and accurate tax returns. You should retain all documents, cancelled checks, and other data that support your reported income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for your income tax returns, and therefore, you should review them carefully before you sign them.

#### OUR RESPONSIBILITIES

We are responsible for taking the information given to us by you and ensuring your tax returns are accurate to the best of our knowledge. We are also responsible for the timely electronic filing of your tax returns.

During our engagement with you, we may provide you with an estimated refund date. We do not however have any influence over the IRS or State issuing your refunds. These taxing authorities do not guarantee a specific date that a tax refund will be issued.

Your tax returns may be selected for audit by a taxing authority. In the event of a tax examination, we can arrange to assist you with any correspondence or communication that is initiated by the IRS or State.

It is our policy to keep records related to this engagement for 3 years. However, we do not keep any of your original records, so you should retain these records in secure storage. Upon the expiration of the 3 year period, we are free to destroy our records.

In the event of a complaint related to the services we provide, we agree to discuss the complaint, and if necessary, to take action in a good faith effort to resolve the complaint.

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All information I have given is true and correct to the best of my knowledge. I also agree to and accept the Terms of Engagement.

Your Signature

Spouse's Signature

Date