*Updegrove, McDaniel, McMullen & Chiccehitto, PLC*

**2021 INDIVIDUAL TAX QUESTIONNAIRE (FORM 1040)**

**Please check the appropriate box and include an explanation if applicable. Details and documentation must be provided with your tax return information at the beginning of the year, or with this questionnaire.**

**Name:** ____________________ **Circle preferred method of contact: Email, phone, text**

**Taxpayer Email:** ____________________ **Spouse Email:** ____________________

**Taxpayer Phone:** ____________________ **Spouse Phone:** ____________________

## Personal Information

| | Yes | No | Explanation |
|---|---|---|---|
| 1. Did your marital status, dependents, or address change during the year? | ☐ | ☐ | |
| 2. Did you retire or change jobs this year? | ☐ | ☐ | |
| 3. Were you a resident of, or did you have income from, more than one state during the year? | ☐ | ☐ | |
| 4. Is all beneficiary information up-to-date for any wills, trusts, retirement plans and investment accounts? | ☐ | ☐ | |
| 5. Do you have any children that are under age 19 or full-time students under age 24 with unearned income in excess of $1,100? | ☐ | ☐ | |
| 6. Did you provide over half the support for any other person(s) during the year? | ☐ | ☐ | |
| 7. Did you make gifts of more than $15,000 to any individual? | ☐ | ☐ | |
| 8. Did you pay any individual as a household employee during the year? | ☐ | ☐ | |

## Income Information

| | Yes | No | Explanation |
|---|---|---|---|
| 1. Did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency (Bitcoin, Ethereum, other digital currency)? | ☐ | ☐ | |
| 2. Did you receive any proceeds from: | | | |
| a. Business, farm, or rental property? | ☐ | ☐ | |
| b. An installment sale? | ☐ | ☐ | |
| c. A Health Savings Account (HSA)? | ☐ | ☐ | |
| d. Alimony? | ☐ | ☐ | |
| e. Social Security? | ☐ | ☐ | |
| f. Unemployment or disability? | ☐ | ☐ | |
| g. Side business (Uber, internet sales) or barter income? | ☐ | ☐ | |
| h. An education savings or 529 Plan account? | ☐ | ☐ | |
| i. Advanced child tax credit payments? Provide Letter 6419 from the IRS. | ☐ | ☐ | |
| j. An employer stock bonus plan? | ☐ | ☐ | |
| k. COVID-19 funding **in 2021** (PPP, SBA, EIDL, state or local government grants, ERC, etc.)? | ☐ | ☐ | |
| 3. Did you receive any distributions from a retirement plan or IRA? Did you repay any 2020 distributions? | ☐ | ☐ | |
| 4. Did you rollover a retirement plan distribution into another plan? | ☐ | ☐ | |
| 5. Did you convert a traditional IRA to a Roth IRA? | ☐ | ☐ | |

## Foreign Information

| | Yes | No | Explanation |
|---|---|---|---|
| 1. Did you have an interest in or signature authority over a financial account in a foreign country? | ☐ | ☐ | |
| 2. Were you the grantor of or transferor to a foreign trust? | ☐ | ☐ | |
| 3. Did you receive income from or pay tax to a foreign government? | ☐ | ☐ | |

## Deduction Information

| | Yes | No | Explanation |
|---|---|---|---|
| 1. Did you maintain a home office that you used exclusively for business? | ☐ | ☐ | |
| 2. Did you contribute to, or would you like to contribute to a self-employed retirement plan? | ☐ | ☐ | |
| 3. Did you contribute to, or (if eligible) would you like to contribute to an HSA? | ☐ | ☐ | |
| 4. Did you contribute to, or would you like to contribute to a traditional or Roth IRA? | ☐ | ☐ | |
| 5. Did you pay for child care while you worked or looked for work? | ☐ | ☐ | |
| 6. Do you have evidence to substantiate charitable contributions? | ☐ | ☐ | |
| 7. Did you make any noncash charitable contributions? Please provide documentation for donations over $500. | ☐ | ☐ | |
| 8. Did you have substantial out-of- pocket medical expenses? | ☐ | ☐ | |
| 9. Did you, your spouse, or your dependents pay tuition or student loan interest? | ☐ | ☐ | |
| 10. Did you make any contributions to an education savings or 529 Plan account? | ☐ | ☐ | |

## Purchases, Sales & Debt Information

| | | | |
|---|---|---|---|
| 1. Did you purchase or sell a business, farm, or rental property during the year? | ☐ | ☐ | |
| 2. Did you acquire a new or additional interest in a partnership, LLC or S corporation? | ☐ | ☐ | |
| 3. Did you foreclose or abandon a principal residence or real property during the year? | ☐ | ☐ | |
| 4. Did you dispose of any stock during the year? | ☐ | ☐ | |
| 5. Did you take out a home equity loan or refinance a principal/second residence this year? | ☐ | ☐ | |
| 6. Did you incur any bad debts or have any debts canceled/forgiven this year? | ☐ | ☐ | |

**NOTE** - provide closing statements for any purchases or sales of property.

## Health Care Information

| | | | |
|---|---|---|---|
| 1. Did you have lower cost Marketplace Coverage under the Affordable Care Act? If yes, please provide any Form(s) 1095-A you received. | ☐ | ☐ | |
| 2. Did you pay long-term care premiums for yourself or your spouse? | ☐ | ☐ | |
| 3. If you are a business owner, did you pay health insurance premiums for you or your employees this year? | | | |

## Miscellaneous Information

| | | | |
|---|---|---|---|
| 1. Did you receive an identity protection PIN from the state or the Internal Revenue Service? | ☐ | ☐ | |
| 2. Have you received any IRS or state tax notices or other correspondence? | ☐ | ☐ | |
| 3. Do you want to designate $3 to the Presidential Election Campaign Fund? | ☐ | ☐ | |
| 4. May the IRS discuss this return with the preparer? | ☐ | ☐ | |
| 5. Would you like direct deposit if entitled to a refund? | ☐ | ☐ | |
| 6. Would you like direct withdrawal if you owe taxes? | ☐ | ☐ | |
| 7. Do you expect your 2022 income and expenses to be similar to 2021? | ☐ | ☐ | |
| 8. Are there any tax, personal financial or tax planning issues on which you would like us to focus? If yes, please explain or contact us. | ☐ | ☐ | |

**Please provide dates and estimated tax payments paid:**

**Federal Estimates:**

| Due Date | Date Paid | Amount |
|---|---|---|
| Q1 – 4/15/21 | | |
| Q2 – 6/15/21 | | |
| Q3 – 9/15/21 | | |
| Q4 – 1/17/22 | | |
| Additional | | |

**Virginia (or other state) Estimates:**

| Due Date | Date Paid | Amount |
|---|---|---|
| Q1 – 5/01/21 | | |
| Q2 – 6/15/21 | | |
| Q3 – 9/15/21 | | |
| Q4 – 1/17/22 | | |
| Additional | | |