

## Tax Prep Questionnaire

**Please return this questionnaire when you drop off or upload your tax documents for the tax year.  
\*\*We recommend not bringing in your tax documents until you have received everything\*\***

**Client Name:** Taxpayer: \_\_\_\_\_ Taxpayer's last 4 #s of SSN: \_\_\_\_\_

Spouse: \_\_\_\_\_ Spouse's Last 4 #s of SSN: \_\_\_\_\_

**Driver's License:** *\*\*We only need this information if you renewed your licenses in 2021 or 2022, or you are a new client\*\**

Taxpayer's License Number: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Spouse's License Number: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

**Address:** Did you move in 2021?:  Yes  No If Yes, When?: \_\_\_\_\_ (Month)

Current Address:

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Bank Info Verification:**

Bank Name: \_\_\_\_\_

Rounting Number : \_\_\_\_\_

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

Type of Account:  Checking  Savings Joint Account?:  Yes  No

If you receive a tax refund, please select 1 option:  Direct Deposit  Mail Check  Rollover

Does the Taxpayer or Spouse have a Foreign Bank Account?:  Yes  No

**Contact Info:**

Taxpayer's Preferred Contact Information

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

Email: \_\_\_\_\_

Spouse's Preferred Contact Information

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

Email: \_\_\_\_\_



**Documentation Reminder:**

**\*\*Please open all mailed tax documents that you provide to us. Additionally, include *totaled individual amounts* for charitable contributions, out-of-pocket medical insurance/expenses and RX, even though you may not itemize.\*\***

**Questions:**

1.) Did you receive the 3rd stimulus check in 2021? (The \$1400/person or dependent)  Yes  No  
 If so, have you included in your tax documents the IRS Letter 1444-C?  Yes  No  
 How much in total for the 3rd stimulus did you receive? \$ \_\_\_\_\_

If the 3rd stimulus checks were deposited into 2 different accounts, how much did each taxpayer receive?

Taxpayer: \$ \_\_\_\_\_ Spouse: \$ \_\_\_\_\_

2.) Did your marital status change in 2021?  Yes  No

3.) Were there any changes in dependents from the prior year? *Ex: New child*  Yes  No

If so, please include their Name, DOB, SSN, and months lived in the home below.

4.) Did you receive the Advanced Child Tax Credit in monthly payments?  Yes  No

If so, have you included in your tax documents the IRS Letter 6419?  Yes  No

How much in total did you receive? \$ \_\_\_\_\_

If the payments were deposited into 2 different accounts, how much did each taxpayer receive?

Taxpayer: \$ \_\_\_\_\_ Spouse: \$ \_\_\_\_\_

5.) Did you, your spouse, or dependent have any educational expenses in 2021?  Yes  No

If so, please include Form-1098-T. May need to be downloaded from online.

6.) Did you contribute to an IRA, ROTH IRA, myRA, Keogh, SIMPLE, SEP, 401K, or other retirement plan? **\*\*Not including amounts contributed via your employer\*\***  Yes  No

7.) In 2021, did you receive, sell, send, exchange, or acquire any virtual currency?  Yes  No

Please explain any changes or "Yes" responses from above, below:

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**Desired Delivery Option For Finished Returns:**

**Schedule A Pickup Time Slot:**

*We will call to setup a time for the taxpayer and spouse to come in and pick up the tax returns and sign the 8879 in order for us to electronically file the returns.*

**Electronic Website Portal (From Orchard Accounting via Onvio Client Center Portal):**

*We will upload the tax returns, bill, and 8879 to be signed in order for us to electronically file the returns. The signed 8879 will either need to be uploaded, mailed or dropped off to us.*

**USPS Mail Delivery:**

*We will mail back the original tax documents, tax returns, bill, and 8879 to be signed in order for us to electronically file the tax returns. The signed 8879 will either need to be mailed or dropped off to us.*

**\*\*Please note there may be an additional charge to mail the documents.\*\***