

Happy New Year! Tax season is upon us once again. This year brings about revised tax forms.

The Affordable Care Act penalties are no longer being assessed. However, if you obtained health insurance through the exchange/marketplace, please provide the Form 1095-A sent to you from the marketplace.

\*\*\*\*\*

To expedite the personal returns, we thought we would ask these questions as well:

Is your bank account the same as last year? \_\_\_\_\_ If not, please provide:

Your bank name \_\_\_\_\_

Your account number \_\_\_\_\_ OR Please provide a voided check

Your routing number \_\_\_\_\_

\*\*\*\*\*

Illinois is once again asking whether you purchased any items on the internet, from a catalog or while traveling out of state without paying sales tax. If you live outside of Illinois and your state also taxes assesses use tax, please be sure to answer these questions.

Did you have any untaxed purchases in 2020? \_\_\_\_\_ If so, please provide the amount of untaxed purchases. \_\_\_\_\_

This amount will be multiplied by 6.25% for Illinois, in order to calculate the amount of use tax to be paid for the year.

\*\*\*\*\*

My tax software requires driver's license information. Please provide the following for yourself (and your spouse, if applicable) or confirm that the information provided last year has not changed:

Driver's License number: \_\_\_\_\_

State of Issue: \_\_\_\_\_

Issue Date: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

\*\*\*\*\*

At any time during 2020, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency? Please answer yes \_\_\_\_\_ no \_\_\_\_\_

\*\*\*\*\*

New for 2020: Please provide the IRS letters 1444-A and 1444-B which will reflect the Economic Impact Payment or Stimulus checks/payments you received in 2020 and 2021. These payments are not income and not taxable, however, this information is needed in order to reconcile your 2020 return. You may be eligible for more depending on your circumstances. If you received more than you were entitled to, you will not be required to repay it.

If you did not receive the letters, please provide the amount received:

\$ \_\_\_\_\_ for Round 1 and \$ \_\_\_\_\_ for Round 2.

I thank you in advance for answering the above questions. I look forward once again to working with you this year!