

PK Tax Services Tax Year 2021 Questionnaire

Name(s): _____

Happy New Year! Tax season is upon us once again. Here are questions required to be answered prior to preparing your returns. 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, please answer the following questions:

Is your bank account the same as last year? Yes _____ No _____ 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 2021? _____ 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 if applicable, your spouse in the second column) or confirm that the information provided last year has not changed:

No Change/Same as Last Year

Taxpayer

Spouse

Driver's License Number: _____

State of Issue: _____

Issue Date: _____

Expiration Date: _____

At any time during 2021, did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currency? Please Answer Yes _____ No _____

Again for 2021: Please provide IRS letter 1444-C which will reflect the Economic Impact Payment or Stimulus check/payment you received in May 2021. This payment is not income and not taxable, however, this information is needed in order to reconcile your 2021 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 letter, please provide the amount received: \$ _____ for Round 3

New for 2021: Please provide IRS Letter 6419, which will reflect the child tax credit advances you received in 2021. These payments are not income and not taxable, however, this information is needed in order to reconcile your child tax credit. You may be eligible for more, however, if you received more than you were entitled to, you will be required to repay it.

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