

*****PLEASE ANSWER ALL QUESTIONS AND RETURN WITH YOUR 2021 TAX DOCUMENTS*****

PREFERRED NAMES								
PHONE NUMBER				EMAIL				
1a	DO YOU HAVE A CHANGE IN ADDRESS?						YES	NO
1b	DO YOU HAVE A CHANGE IN DEPENDENTS?						YES	NO
1c	DO YOU HAVE A CHANGE IN FILING STATUS?						YES	NO
2	DO YOU WANT US TO MAIL YOUR RETURN AND/OR ORIGINAL INFO TO YOU FOR \$10?						YES	NO
3	DID YOU RECEIVE A LETTER FROM IRS WITH AN IDENTITY PROTECTION PIN?						YES	NO
4a	HOW MUCH DID YOU RECEIVE FOR THE 3RD ECONOMIC STIMULUS PAYMENT?						\$	
4b	HOW MUCH, IF ANY, DID YOU RECEIVE AS A "PLUS UP" STIMULUS PAYMENT?						\$	
USE YOUR ONLINE ACCOUNT AT IRS.GOV OR REVIEW YOUR IRS LETTER 6475 IF YOU ARE UNSURE.								
5	INDICATE HOW MUCH YOU RECEIVED EACH MONTH AS AN ADVANCE CHILD TAX CREDIT PAYMENT.							
	JULY	AUG	SEPT	OCT	NOV	DEC		
	\$	\$	\$	\$	\$	\$		
USE THE CHILD TAX CREDIT PORTAL AT IRS.GOV OR REVIEW YOUR IRS LETTER 6419 IF YOU ARE UNSURE.								
6	DID YOU RECEIVE, SELL, EXCHANGE OR OTHERWISE DISPOSE ANY VIRTUAL CURRENCY?						YES	NO
7a	DID YOU HAVE ANY DIRECTLY HELD FOREIGN INVESTMENTS OR INCOME?						YES	NO
7b	DID YOU HAVE SIGNATURE AUTHORITY OVER A FOREIGN FINANCIAL ACCOUNT?						YES	NO
7c	ARE YOU THE GRANTOR OF, TRANSFEROR TO, OR RECIPIENT OF A FOREIGN TRUST?						YES	NO
7d	DO YOU OWN ANY PROPERTY IN A FOREIGN COUNTRY?						YES	NO
8	DID YOU RECEIVE YOUR HEALTH CARE THROUGH THE HEALTHCARE EXCHANGE?						YES	NO
9a	DID YOU RECEIVE ANY UNEMPLOYMENT BENEFITS DURING THE YEAR?						YES	NO
9b	DID YOU TAKE A RETIREMENT DISTRIBUTION DURING THE YEAR?						YES	NO
9c	DID YOU ROLLOVER AN IRA LAST YEAR?						YES	NO
9d	DID YOU BEGIN RECEIVING A NEW PENSION OR SOCIAL SECURITY BENEFITS?						YES	NO
10	DID YOU CONTRIBUTE TO A RETIREMENT PLAN LAST YEAR?						YES	NO
	IF YES, WHAT TYPE OF PLAN IS IT?			401K	SIMPLE	SEP	ROTH IRA	TRADITIONAL IRA
	HOW MUCH DID YOU CONTRIBUTE?			TAXPAYER: \$			SPOUSE: \$	
11	DID YOU PURCHASE, SELL, OR REFINANCE A HOUSE LAST YEAR?						YES	NO
12a	DID YOU MAKE ANY CASH CHARITABLE CONTRIBUTIONS IN 2021?						YES	NO
12b	DID YOU MAKE ANY NON-CASH CHARITABLE CONTRIBUTIONS IN 2021?						YES	NO
12c	INDICATE THE FAIR MARKET VALUE OF NON-CASH CHARITABLE CONTRIBUTIONS						\$	
13a	DID YOU CONTRIBUTE TO A HEALTH SAVINGS ACCOUNT OUTSIDE OF YOUR PAYCHECK?						YES	NO
13b	DID YOU WITHDRAW FROM A HEALTH SAVINGS ACCOUNT?						YES	NO
14a	DID YOU INCUR CHILD CARE EXPENSES FOR DEPENDENTS?						YES	NO
14b	DID YOU INCUR HIGHER EDUCATION EXPENSES?						YES	NO
14c	HOW MUCH, IF ANY, DID YOU CONTRIBUTE TO A GEORGIA 529 COLLEGE SAVINGS PLAN?						\$	
15	DID YOU PARTICIPATE IN ANY STATE TAX CREDIT PROGRAMS?						YES	NO
16	INDICATE THE AMOUNTS AND DATES PAID FOR ANY ESTIMATED TAXES						IRS	STATE
	1ST QUARTER	DATE PAID			AMOUNT	\$	\$	
	2ND QUARTER	DATE PAID			AMOUNT	\$	\$	
	3RD QUARTER	DATE PAID			AMOUNT	\$	\$	
	4TH QUARTER	DATE PAID			AMOUNT	\$	\$	
17a	DID YOU RECEIVE ANY SELF-EMPLOYMENT INCOME?						YES	NO
17b	WILL YOU RECEIVE A K-1 FROM A PARTNERSHIP, S CORPORATION, TRUST, OR ESTATE?						YES	NO
17c	DID YOU RECEIVE A PAYCHECK PROTECTION LOAN OR FORGIVENESS IN 2021?						YES	NO
17d	DID YOU RECEIVE ANY OTHER GRANTS OR PANDEMIC ASSISTANCE?						YES	NO
18	ADDITIONAL INFORMATION:							

SIGNED _____

DATE _____