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**2021 Tax Filing Information**

**Today's Date:**

<b>Taxpayer's Name:</b>		<b>Spouse's Name:</b>	
<b>SSN#:</b>		<b>SSN#:</b>	
<b>Date of Birth:</b>		<b>Date of Birth:</b>	
<b>Phone#:</b>		<b>Phone#:</b>	
<b>Email Address:</b>		<b>Email Address:</b>	
<b>Address:</b>		<b>Address:</b>	

**Filing Status:**

<b>*Single</b> _____	<b>Married, filing separately</b> _____
<b>Married, filing jointly</b> _____	<b>Head of Household</b> _____

**\*If filing single, and you had any biological children or parents who lived with you for more than six months in 2021, you MAY qualify to file as Head of Household. Please consult with your tax preparer.**

1. Did you purchase health insure from the marketplace in 2021?	Yes	No
2. Did you take a COVID-19 retirement withdrawal in 2021?	Yes	No
a) If yes, to #2, did you take income over the three years allowed?	Yes	No
3. Did you receive any unemployment benefits in 2021?	Yes	No
4. How much did you receive from Stimulus #3?	Amount:	
5. Did you receive any Advanced Child Tax Credit in 2021?	Yes	No
a) If yes to #5, how much did you receive TOTAL?	Amount:	

Do you want to purchase the Audit Protection Program?	Yes	No
Do you want an organizer sent to you for your 2022 taxes?	Yes	No

**Bank Information for Direct Deposit: Checking or Savings?**

**If you do not write this information down, your refund will be mailed to you.**

**Routing#:**\_\_\_\_\_ **Account#:**\_\_\_\_\_

**Signatures**

Taxpayer:	
Spouse:	