

**JEFF PINKNEY CPA, INC.
CERTIFIED PUBLIC ACCOUNTANT**

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CLIENT CHECK IN WORKSHEET - Tax Year 2021

Name: _____

Check in date: _____

Address: No Change / Same as prior year ()

New: _____

Phone: _____

Email: _____

If a refund is due, do you want it direct deposited? Yes () No ()

Is your bank account the same as last year? Yes () No ()

Financial Institution Name: _____
Routing #: _____
Account #: _____
Checking () Savings ()

**If a balance due, do you want the payments Yes () No ()
drafted from your account ? (Amounts will be set to come out April 15th)**

COVID Questions

Did you receive your 3rd Covid Stimulus Check? Yes () No ()

Stimulus #3 (Mar/Apr 2021) amount _____

Dependency Changes: No Change - Same as prior year ()

New dependent ()

Name: _____

DOB: _____

SSN: _____

Relationship: _____

Missing Items or Notes:

| Name _____ | Tax Year _____ | Yes | No |
|--|----------------|-------|-------|
| 1) Did you receive any Advance Child Tax Credit payments? If so, we need IRS Letter 6419. | | _____ | _____ |
| 2) Did you or your spouse make charitable contributions in 2021? If yes, how much \$_____ | | _____ | _____ |
| 3) Would you like to contribute to an IRA for the 2021 year? We can calculate the maximum amount you are able to contribute once we work up the tax return. Please let us know if you will be contributing to a Traditional IRA or a Roth IRA. | | _____ | _____ |
| 4) Do you expect your 2022 taxable income and withholdings to be different from 2021? | | _____ | _____ |
| 5) Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? If yes provide receipts/documentation. | | _____ | _____ |
| 6) Did you have any transactions pertaining to a health savings account (HSA) or medical savings account (MSA)? If so, include all form 1099-SA and/or 5498-SA? If you had any distributions, were they used for qualifying medical expenses? | | _____ | _____ |
| 7) Are you enrolled in Marketplace Health Insurance? If so, please include the 1095-A in order to reconcile your advance premium tax credits. | | _____ | _____ |
| 7) Do you or any of your dependents pay tuition to a secondary educational institution? If so, include Form 1098-T. Also include the cost of books/supplies required for the related tuition. | | _____ | _____ |
| 8) Did you pay any student loan interest? If so, include form 1098-E. | | _____ | _____ |
| 9) Are you or your spouse an educator that spent \$250 or more of personal money on materials or supplies for your classroom? | | _____ | _____ |
| 10) Did you have any interest in or a signature authority over a bank account, securities account, or other financial account in a foreign country? | | _____ | _____ |
| 11) At any time during 2021, did you or your spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any crypto or virtual currency? | | _____ | _____ |

Tax Form Reference Guide Please send us all tax forms you receive. We will scan and return all your documents to you.

| Income/Deduction | Tax Form |
|--|-----------------------|
| Wages | W-2 |
| Interest, Dividends, Sale of Stocks, Securities, Capital Assets | 1099-INT / DIV / B |
| Miscellaneous Income | 1099-MISC or 1099-NEC |
| Retirement/IRA/Pension Distributions | 1099-R |
| Social Security Income | SSA-1099 |
| Unemployment Compensation | 1099-G |
| Pass-thru Income (LLC's, S Corps, Partnerships, Trusts, Estates) | Schedule K-1 |
| Mortgage Interest | 1098 |
| Health Savings Account | 1099-SA or 5498-SA |
| Healthcare Coverage | 1095-A |
| Student Loan Interest | 1098-E |
| Tuition | 1098-T |