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**2021 QUICK INTAKE FORM**

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| 1. Changes to your address, phone, email, dependents, or filing status? ⃝ YES ⃝ NO   Please note changes herein: |
| 1. Did anyone to be claimed on your tax return receive the third-round Federal Economic Stimulus Payment (Max amount of $1,400)? TOTAL AMOUNT RECEIVED $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ ⃝ NONE |
| 1. Are you claiming dependents? ⃝ YES ⃝ NO   If yes, request a required DUE DILIGENCE FORM.  If yes, did you include your form 6419 with your 2021 tax documents? |
| 1. Are you claiming an Earned Income Credit without dependents? ⃝ YES ⃝ NO   If yes, request a required EIC FORM. |
| 1. Do we have current copies of your/spouse’s Driver Licenses or State ID? ⃝ YES ⃝ NO If not, please provide copies or request DL FORM. |
| 1. Are you a new client? ⃝ YES ⃝ NO If yes, request a PERSONAL DATA FORM and MISCELLANEOUS INFORMATION FORM. |
| 1. Did you receive Federal or State unemployment benefits in 2021? ⃝ YES ⃝ NO If yes, include 1099 Form(s). |
| 1. New for 2021: Taxpayers and their spouses who don’t itemize may now deduct up to $300 EACH per year in CASH charitable contributions.   Did you contribute money to a qualified charity? ⃝ YES ⃝ NO If yes, Amount $\_\_\_\_\_\_\_\_\_\_\_ |
| 1. Did you make 2021 Estimated Tax Payments to IRS or any State? ⃝ YES ⃝ NO   If yes, provide details. |
| 1. Do you want tax refunds (if applicable) Directly Deposited into your bank account? ⃝ YES ⃝ NO   If yes, is your bank info on your prior year return correct? ⃝ YES ⃝ NO  If not on file, please provide a cxld check OR bank name, routing number, and account number below. |
| **CLIENT COMMENTS/QUESTIONS**  Please note any comments or questions you’d like to address to your tax preparer |
| *Continue on back if necessary* |