

2021

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US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2021, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your <u>marital status</u> CHANGE during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your <u>address</u> CHANGE during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a <u>dependent</u> on <u>another person's</u> tax return for 2021? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you or your spouse issued an <u>Identity Protection PIN</u> by the IRS? If yes, please provide copy of letter. |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any CHANGES in dependents? (Include non-child dependents for whom you provided more than half the support, common example: parents.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children, who might be claimed as dependents, 19 years of age or older (or 24 years or older if student) at the end of 2021? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2021, with interest and dividend income in excess of \$1,100, or total investment income in excess of \$2,200? |

INCOME

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE <u>unemployment benefits</u> ? If yes, please provide copy of Form 1099-G. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE a <u>3rd stimulus check (Economic Impact Payment)</u> from the government in April/ May of 2021? If yes, the IRS sent out <u>Letter 6475</u> which will show the amount you received. |

Third stimulus check \$ _____

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE gambling income or lottery winnings? If yes, please provide copies of Form W-2G and a list of gambling losses. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE any income from AirBNB or VRBO? Did you receive a Form 1099K? Please provide copy. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE unreported <u>tip income</u> of \$20 or more in any month? |

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INCOME (Cont'd.)

Yes

No

Did you RECEIVE grants of stock options from your employer, EXERCISE any stock options granted to you or DISPOSE any stock acquired under a qualified employee stock purchase plan? If yes, please provide documentation for transactions or Form 3922 for ESPP transactions.

Did you RECEIVE any disability income? If yes, was the benefit employer provided?

Did you have any FOREIGN INCOME or pay any FOREIGN TAXES? (Do not count foreign income and taxes reported on your brokerage statement.)

PURCHASES, SALES AND DEBT

Did you START a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

Did you PURCHASE or DISPOSE of any business assets (furniture, equipment, vehicles, real estate, etc.), or CONVERT any personal assets to business use?

Did you BUY or SELL any stocks, bonds or other investment property in 2021 not reported on Form 1099-B?

Did you receive, sell, exchange or dispose of any CRYPTOCURRENCY (i.e., Bitcoin) in 2021?

Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2022? (This is not applicable if you hold your investments within a commercial brokerage firm, as the brokerage firm will track this information on your behalf.)

Did you PURCHASE, SELL, or REFINANCE your principal home or second home, or did you take a home equity loan? **If yes, include a copy of the final settlement statement.**

If you SOLD your residence or vacation property, did you ever rent out the property?

If you SOLD your residence, did you own and occupy as your principal residence for at least two of the last five years prior to the sale?

Did your business receive a **Paycheck Protection Program (PPP)** loan? If yes, how much was received? Have you applied for forgiveness? If yes, how much was forgiven?

Did you have any debts CANCELLED or FORGIVEN? **If yes, include copies of Form 1099-C if received?**

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- Yes No
- PURCHASES, SALES AND DEBT (Cont'd.)
- Does anyone owe you money which has become UNCOLLECTIBLE? If yes, provide detail of debtor's name, relationship to you, amount, description of debt, and description of efforts to collect debt.
- RETIREMENT PLANS**
- Did you RECEIVE a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
- Did you MAKE a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
- Did you TRANSFER or ROLLOVER any amount from one retirement plan to another retirement plan?
- Did you CONVERT part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2021?
- Did you RETIRE or CHANGE jobs?
- EDUCATION**
- Did you receive a DISTRIBUTION from an Education Savings Account or a Qualified Tuition Program (529 Plan)? **If yes, please include Form 1099-Q.**
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? **If yes, please include Form 1098-T.**
- Did you pay any student loan interest? **If yes, please include Form 1098-E.**
- Did you receive a refund of tuition paid? **If yes, please include Form 1098-T.**
- ITEMIZED DEDUCTIONS**
- If you generally take the standard deduction, did you make any CASH charitable contributions? Please provide a list of those contributions
- Did you INCUR a loss because of damaged or stolen property that you did not receive any insurance reimbursement for?
- Did you make any LARGE PURCHASES, such as motor vehicles and boats? **If yes, provide sales tax paid on purchases.**
- Did you remodel or make CAPITAL IMPROVEMENTS to your house? **If yes, provide sales tax paid.**

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ITEMIZED DEDUCTIONS (Cont'd.)

Yes

No

Do you have HELOC interest expense? If yes, what were the loan proceeds used for.

Did you make NON-CASH CHARITABLE CONTRIBUTIONS greater than \$500? If yes, provide the name and address of charity, thrift shop value of donation, date of contribution, and description of contribution.

TAX CREDITS

Did you receive any **Advance Child Tax Credits**? The IRS sent out Letter 6419 in January 2022 providing the total advance payments received, **please provide copy of letter.**

Did you pay for childcare while you or your spouse worked or looked for work?

Do you PAY health insurance through an Obamacare Exchange? If yes, did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement)? If yes please attach.

Did you PURCHASE a new qualified plug-in electric motor vehicle?

Did you make any residential energy-efficient improvements or purchases involving SOLAR, WIND, GEOTHERMAL or FUEL CELL ENERGY SOURCE? (for example: install solar panels)

ESTIMATED TAXES

Did you apply an overpayment of 2020 taxes to your 2021 estimated tax (instead of being refunded)?

If you have an overpayment of 2021 taxes, do you want the excess APPLIED to your 2022 estimated tax (instead of being refunded)?

Do you expect your 2022 taxable income and withholdings to be DIFFERENT from 2021?

MISCELLANEOUS

Do you want to allocate \$3 to the Presidential Election Campaign Fund?

Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

May the IRS discuss your tax return with McDevitt & Duffy CPAs, PS

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MISCELLANEOUS (Cont'd.)

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have an INTEREST IN or SIGNATURE AUTHORITY over a <u>financial account in a foreign country</u> , such as a bank account, securities account, or other financial account? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of, or transferor to, a <u>foreign trust</u> or did you have an interest in any <u>foreign assets</u> or accounts? |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your HOME <u>rented out</u> or <u>used for business</u> ? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and <u>pay qualified higher education expenses</u> for yourself, your spouse, or your dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay <u>in excess of \$2,300</u> during the year for domestic services performed in or around your home to individuals who could be considered <u>HOUSEHOLD EMPLOYEES</u> ? (If only the worker can control how the work is done, the worker isn't your employee but is self-employed. A self-employed worker usually provides their own tools and offers services to the general public in an independent business. For more information see IRS Publication 926: Household Employer's Tax Guide.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage in any BARTERING transactions? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you NOTIFIED or AUDITED by either the IRS or the State taxing agency? For example, did the IRS send you a tax notice changing your 2020 tax refund or overpayment. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any GIFTS to an individual that <u>total more than \$15,000</u> , or any gifts to a trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your bank account information CHANGE within the last twelve months (for electronic deposit of refund or payment of tax)? |

ADMINISTRATION

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like us to EMAIL your organizer to you next year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like receive your finished 2021 tax package ELECTRONICALLY? In one application you would get PDF copies of your tax return, invoice and your original documents and you would sign your return electronically. |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like to contribute to or max out your IRA or ROTH IRA for 2021 before April 15th? Or if you are self-employed, maximize your retirement contribution. |

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ADMINISTRATION (Cont'd.)

Yes

No

If you don't qualify to make a ROTH IRA contribution, would you like to discuss making a "back-door ROTH IRA" contribution? (This is an administrative loophole to enable some people to sidestep the ROTH IRA contribution rules even though they didn't qualify originally.)

Would you like to contribute to or max out your HSA account (Health Savings Account) for 2021 before April 15th? (To qualify your minimum health insurance deductible must be \$1,400 for a single plan and \$2,800 for a family plan).

If you would like to make a TAX APPOINTMENT

* Call Leah for an appointment (425) 774-5300

* Email Leah at Leah@McDuffyCPA.com

I have read McDevitt & Duffy CPAs PS's Individual Tax Return Engagement Letter. The terms of this engagement are acceptable to me. (If this is a joint return, I am signing for both of us.) The information I have provided or will provide in connection with this tax return is true, correct and complete to the best of my knowledge.

APPROVED BY: _____ DATE: _____