

**Sam Phillips, CPA  
1040 Client Fact Sheet  
Income Tax Year 2021**

Today's Date \_\_\_\_/\_\_\_\_/2022

Taxpayer's Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Soc Sec # \_\_\_\_ - \_\_\_\_ - \_\_\_\_

Spouse's Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Soc Sec # \_\_\_\_ - \_\_\_\_ - \_\_\_\_

Address \_\_\_\_\_ County \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

How do you want us to contact you?  Call  Text  Email  No Preference

What format would you like when your return is complete?

- I prefer to pick up a paper copy of my return  I prefer to download a digital copy

**Filing Status**

- Married Filing Jointly  Married Filing Separately  
 Single  Head of Household (see addt'l form)  
 Surviving Spouse  Unsure  
*(Date of spouse's death: \_\_\_\_/\_\_\_\_/\_\_\_\_)*

**Household members (DO NOT INCLUDE YOU OR YOUR SPOUSE) (See addt'l form)**

First Name	Last Name	Social Sec # or Tax ID #	Date of Birth	Relationship	Check if claiming

**Please check all of the following that applies to you in 2021:**

- Had a business or were self-employed in 2021
- Paid property taxes (How many parcels? \_\_\_\_ County? \_\_\_\_\_)
- Made state or federal estimated tax payments (e.g. quarterly tax payments)
- Received unemployment income
- Had a bank account outside of the United States
- Bought/sold/inherited property
- Had debt cancelled (e.g. bankruptcy)
- Installed geothermal or solar units
- Had transactions involving cyber currency (e.g. Bitcoin, etc.)
- Gave away property or cash greater than \$15,000
- Built a house
- Made cash donations of \$300/\$600 or more to a charitable organization \$ \_\_\_\_\_
- Paid or Received alimony
- Paid childcare
- Paid a household employee (babysitter/caregiver/housekeeper) over \$2,230
- Paid private school tuition for a dependent in grades K-12
- Had college expenses for yourself or a dependent
- Made payments on a student loan
- Interested in contributing to an IRA if that would save you taxes



**COVID Considerations**

Did you receive a "Stimulus Payment"?  YES – Exact Amount Received: \$ \_\_\_\_\_  NO  
(approx. \$1400 per person around May 2021)

Did you receive Child Tax Credit Payments?  YES – Exact Amount Received: \$ \_\_\_\_\_  
Please include IRS 6419 letter.  
 NO

Did you purchase health insurance through the marketplace?  YES  NO  
If yes, include form 1095A.

**Preferred Tax Refund Option, if applicable (check one)**

- Paper Check
- Series I Savings Bonds
- Direct Deposit (Please provide bank information below)


Bank Name \_\_\_\_\_  Checking  Savings  
Routing # \_\_\_\_\_  
Account # \_\_\_\_\_

**Are you waiting on any additional tax forms? If so, please describe:**

**Is there anything else you would like us to know about before completing your tax returns? Please tell us:**

**PLEASE SIGN BELOW**

To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Signature  \_\_\_\_\_

Date \_\_\_\_ / \_\_\_\_ / 2022

*Thank you for choosing Sam Phillips, CPA!*