

INTERVIEW QUESTIONNAIRE 2021

If I were meeting with you in person, the information below is what I would be asking you about. Please take the time to supply the needed information. If you have questions, give me a phone call.

Taxpayer name	Spouse name
Taxpayer phone	Spouse phone
Taxpayer email	Spouse email

Stimulus checks were sent last April in the amount of \$1400 per family member. How much did you receive? _____

If you have children, **advanced child credit** payments were sent monthly beginning in July. How much did you receive each month? _____

The IRS will send you a letter in January on each of the above items. It will help me if you enclose that letter with the other information you send me.

If you have **Obamacare** for health insurance, I must have the form 1095A which the insurance company will mail you in January.

Question	Yes	No	If No, provide the new informaton
Are your dependents the same as last year?			
Is your address the same as last year?			
Is your bank info for direct deposit of your refund the same as last year?			

These are possible tax saving items you might have. If any of them apply, write in the amount:

Child care expenses in order to work (I will need the name, address, social security number, and amount paid of each provider)	\$
Charitable donations (Up to \$600 can be deducted this year without having to itemize deductions. These must me deductions for which you have a receipt. Deseret Industries does NOT count.)	\$
Health insurance premiums (If the premiums are deducted from your paycheck, they are pre-tax and don't count. What does count are premiums you pay for out of your own pocket such as medicare <u>supplement</u> premiums. Don't include your medicare premium, because I will get it from your social security statement 1098-SSA you are sending me.)	\$
Education credit for college tuition (I must have the form 1098T from the school. I also need the amount spent on books.)	\$
HSA contribution	\$
HSA withdrawals (form 1099SA)	\$
IRA contribution	\$
Energy saving home improvements	\$
Donations to school, library, or youth ranch (Idaho residents only)	\$
Student loan interest	\$