

## 2021 Questions

**Purpose:** 2021 has been another unique year and as a result there are some questions we need answered before we can prepare your taxes.

*Please answer the following questions and return with the signed disclosure documents.*

**Name:**

### Stimulus Payments

1. Did you receive a stimulus payment in 2021?

Yes                  No

2. If you did receive it, how much did you receive? \$

*Please provide IRS Letter 6475.*

3. Did you receive the advance child tax credit payment?

Yes                  No

3.a. If yes, how many children did you receive it for?

3.b. How much did you receive? \$

*Please provide IRS Letter 6419.*

### Virtual Currency

1. At any time during 2021 did you receive, purchase, sell, send, exchange, or otherwise acquire any financial interest in virtual currency?

Yes                  No

### Health Insurance

1. Did you have health Insurance in 2021 from:

Your employer

Private Insurance (such as Blue Cross/Blue Shield, Select Health, etc.)

The Marketplace/ Exchange (the government pays for part of your premium)

*Please provide form 1095-A*

Medicare/Medicade

2. Did you contribute or take distributions from a Health Savings Account? *If yes, please provide forms 1099-SA (Distribution) and 5498-SA (Contribution)*

Yes                  No