

# From the office of MANY HAPPY RETURNS TAX ORGANIZER

( If you are a new client, please send a copy of last years tax return)

**FOR TAX YEAR 2021**

Your Name	S.S. # - -	Birthdate / /
Spouses Name	S.S. # - -	Birthdate / /
Mailing Address	Home Phone Number ( ) -	Work or Cell Phone Number ( ) -
E-mail Address		

## DEPENDENTS

NAME	S.S. #	D.O.B.	RELATIONSHIP

Was there anyone else you contributed support, that resides in the U.S., Canada or Mexico?

NAME	S.S. #	D.O.B.	RELATIONSHIP	% SUPPORTED	INCOME OF PERSON
					\$
					\$

## CHILD OR DEPENDENT CARE

Did you pay a baby-sitter last year?

NAME OF SITTER	S.S. #	ADDRESS	AMT. PD.
			\$
			\$

If your sitter is an adult & works in your home, you are required to file W-2 forms by January 31. If you want us to prepare these forms contact us right away. Attach the dependent care form from the provider if private care.

## ESTIMATED TAXES

CREDIT FROM PRIOR YEAR'S VOUCHER PAYMENTS	FIRST QUARTER (APRIL 15)	SECOND QUARTER (JUNE 15)	THIRD QUARTER (SEPT. 15)	FOURTH QUARTER (JAN. 15)	TOTAL FOR YEAR
Federal \$	\$	\$	\$	\$	\$
State \$	\$	\$	\$	\$	\$

**Did you receive a stimulus check March 2021 or after?** Yes or No If yes, amount received? \_\_\_\_\_ Eligible families who did not get monthly advance payments in 2021 can still get a lump-sum payment by claiming the Child Tax Credit when they file a 2021 federal income tax return next year. This includes families who don't normally need to file a return. In early 2022, the IRS will send Letter 6475 that contains the total amount of the third Economic Impact Payment and any Plus-Up Payments received. People should keep this and any other IRS letters about their stimulus payments with other tax records. Individuals can also log in to their IRS.gov Online Account to securely access their Economic Impact Payment amounts.

**Did you receive any child tax credits from July 2021 thru December 31,2021?** Yes or No, if Yes, Amount \_\_\_\_\_ In January 2022, the IRS will send Letter 6419 with the total amount of advanced Child Tax Credit payments taxpayers received in 2021. You should keep this and any other IRS letters about advance Child Tax Credit payments with their tax records.

Did you receive unemployment in 2021? Yes No  
 Did you cash out any retirement savings this year? Yes No  
 Were you unemployed, furloughed or work less due to COVID? Yes No  
 Did you invest in or cash out Virtual Currency in 2021? Yes No  
 Did you have a Health Savings Account (HSA)? Yes No

If you answered Yes to any of these, please attach the appropriate forms for tax preparation.

## INCOME

**Wages, Salaries, Tips, Etc.** (Attach W-2s)

**Required Minimum Distributions.** (Attach 1099's)

**Interest income from Seller-Financed Mortgages & Individuals:**

**Interests from Banks & Financial Institutions** (Attach 1099 Int)

Include all that have your Social Security number on them.

NAME	AMOUNT	NAME	AMOUNT
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

Did you sell or turn in any U.S. Savings Bonds? YES  NO

If yes, Please list information: \_\_\_\_\_

Nontaxable Interest: (Attach Information)

Did you have any foreign bank accounts? YES  NO

If yes, please explain \_\_\_\_\_

Did you have any penalties on Early Withdrawal of Savings Certificates? YES  NO

If yes, list or attach information \_\_\_\_\_

**Dividends:** (Attach 1099Div's) **Capital Gain Distributions:** (Attach 1099B's) **Education Distributions:** (Attach 1099Q's)

**Nontaxable Distributions:** (Attach 1099s)

**Pensions:** (Attach 1099Rs)

**Exclusions of Reinvested Dividends from Public Utility:** Attach Information. Did you serve in a **Combat Zone?** \_\_\_\_\_

Did you **Contribute** to your pension plan? \_\_\_\_\_ If yes, have you already recovered your contribution? \_\_\_\_\_

Did you have any **Rollovers?** \_\_\_\_\_ If yes, Attach 1099 Distribution & Rollover papers **Alimony:** How much did you receive? \$ \_\_\_\_\_

Did you invest in any **Traditional IRA's?** If yes, provide statement. \_\_\_\_\_

Did you receive a **Medical Loss Rebate** from your Health Insurance Company this year? If so, how much \$ \_\_\_\_\_.

How did you receive payment? Check \_\_\_\_\_ or **Reduction in Premium** \_\_\_\_\_, check box.

### OTHER INCOME

Estate & Trusts \$ \_\_\_\_\_ (Attach K-1s) Jury Duty \$ \_\_\_\_\_

S-Corporations \$ \_\_\_\_\_ (Attach K-1s) Other \$ \_\_\_\_\_

Partnerships \$ \_\_\_\_\_ (Attach K-1s) Other \$ \_\_\_\_\_

Did you have any tips that you did not report to your employer? If not reported, how much did you receive? \$ \_\_\_\_\_

Prizes & Awards \$ \_\_\_\_\_ State Tax Refund \$ \_\_\_\_\_ Unemployment Compensation \$ \_\_\_\_\_

Lump Sum Distributions \$ \_\_\_\_\_ (Attach 1099R's) Gambling Winnings (Attach W-2 G's) \$ \_\_\_\_\_

### Gains & Losses from Sale of Property, Stock, Etc. (Attach 1099 B's)

Description	Date Bought	Date Sold	Sale Price	Cost & Expense	Gain or Loss
_____	____/____/____	____/____/____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	\$ _____	\$ _____	\$ _____

**SALE OF RESIDENCE** - Please send or bring escrows of purchase & sale of new house. Also list improvements on old house.

### DID YOU HAVE ANY OTHER INCOME FROM ANY OTHER SOURCE?

Source	_____	Amount	\$ _____
Source	_____	Amount	\$ _____
Source	_____	Amount	\$ _____

**SOCIAL SECURITY**

How much did you receive? \$\_\_\_\_\_ How much did your spouse receive? \$\_\_\_\_\_ (Attach SSA 1099s)

If you paid any individuals or Partnership \$600.00 or more for rent or services for business purposes, you are required to file 1099s prior to February 28th. If you would like us to prepare these, please contact us right away.

**FARM INCOME** - If you had any Farm Income, attach or bring in the information.

**OTHER INCOME INFORMATION (DETAIL)**

**OTHER EXPENSE INFORMATION (DETAIL)**

## BUSINESS INCOME / BUSINESS EXPENSES (FOR SELF EMPLOYED)

What is the main business activity? \_\_\_\_\_

Business Name \_\_\_\_\_

Business Address \_\_\_\_\_

**HOW MUCH IS YOUR GROSS BUSINESS INCOME ? \$ \_\_\_\_\_ (Attach 1099 Miscs)**

**HOW MANY MILES DID YOU DRIVE FOR BUSINESS PURPOSES? \_\_\_\_\_**

Merchandise	\$ _____	Real Estate Taxes	\$ _____
Costs of Goods	\$ _____	Other Taxes & Licenses	\$ _____
Materials & Supplies	\$ _____	Travel (no meals)	\$ _____
Advertising	\$ _____	Meals & Entertainment	\$ _____
Bad Debts	\$ _____	Utilities & Telephone	\$ _____
Car & Truck Expense	\$ _____	Wages & Salaries	\$ _____
Commissions	\$ _____	Bank Service Charges	\$ _____
Insurance (other than health)	\$ _____	Tools	\$ _____
Mortgage Interest	\$ _____	Uniforms	\$ _____
Other Interest Paid	\$ _____	Safety Items	\$ _____
Legal & Professional Fees	\$ _____	Freight & Shipping	\$ _____
Office Expenses	\$ _____	Dues & Publications	\$ _____
Rent on Business Property	\$ _____	Laundry & Cleaning	\$ _____
Equipment Rentals	\$ _____	(other)	\$ _____
Repairs	\$ _____	(other)	\$ _____
Supplies	\$ _____	(other)	\$ _____

### INCOME FROM PROPERTY RENTAL

	RENTAL 1	RENTAL 2	RENTAL 3
<b>Rents Received (Attach all 1099s)</b>	\$ _____	\$ _____	\$ _____
Advertising Costs	\$ _____	\$ _____	\$ _____
Association Dues	\$ _____	\$ _____	\$ _____
Auto & Travel	\$ _____	\$ _____	\$ _____
Cleaning & Maintenance	\$ _____	\$ _____	\$ _____
Commissions	\$ _____	\$ _____	\$ _____
Gardening	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____
Legal & Professional Fees	\$ _____	\$ _____	\$ _____
Licenses & Permits	\$ _____	\$ _____	\$ _____
Management Fees	\$ _____	\$ _____	\$ _____
Miscellaneous	\$ _____	\$ _____	\$ _____
Mortgage Interest	\$ _____	\$ _____	\$ _____
Other Interest Paid	\$ _____	\$ _____	\$ _____
Painting & Decorating	\$ _____	\$ _____	\$ _____
Painting Equipment ( brushes, ladders, etc. )	\$ _____	\$ _____	\$ _____
Pest Control	\$ _____	\$ _____	\$ _____
Plumbing & Electrical	\$ _____	\$ _____	\$ _____
Repairs	\$ _____	\$ _____	\$ _____
Supplies	\$ _____	\$ _____	\$ _____
Cleaning Supplies	\$ _____	\$ _____	\$ _____
Tools	\$ _____	\$ _____	\$ _____
Taxes	\$ _____	\$ _____	\$ _____
Telephone	\$ _____	\$ _____	\$ _____
Utilities	\$ _____	\$ _____	\$ _____
Wages & Salaries	\$ _____	\$ _____	\$ _____
Other (list)	\$ _____	\$ _____	\$ _____
Other (list)	\$ _____	\$ _____	\$ _____
Other (list)	\$ _____	\$ _____	\$ _____

**RENTAL INCOME (continued)**

What type of property is the rental? (i.e. four bedroom house, warehouse, trailer park, etc.)

RENTAL 1 \_\_\_\_\_ RENTAL 2 \_\_\_\_\_ RENTAL 3 \_\_\_\_\_

When did you purchase your rental property? (Mm/Yy)

RENTAL 1..... / RENTAL 2..... / RENTAL 3 ..... /

How much did the rental property cost you?

RENTAL 1 \$ \_\_\_\_\_ RENTAL 2 \$ \_\_\_\_\_ RENTAL 3 \$ \_\_\_\_\_

Did you have any Farm Rental Income? \_\_\_\_\_ If yes, attach information. Did you have any Royalties? \_\_\_\_\_ If yes, attach information & 1099s. Did you receive an Education Distribution? \_\_\_\_\_

**DEDUCTIONS**

**MEDICAL**

Medicines \$ \_\_\_\_\_ Drugs \$ \_\_\_\_\_

NAME	Amount Paid After Insurance Reimbursement
Doctors: _____	\$ _____
_____	\$ _____
_____	\$ _____
Dentists: _____	\$ _____
_____	\$ _____
_____	\$ _____
Orthodontists: _____	\$ _____
_____	\$ _____
_____	\$ _____
Practitioners: _____	\$ _____
_____	\$ _____

NAME	Amount Paid After Insurance Reimbursements
Specialists: _____	\$ _____
_____	\$ _____
_____	\$ _____
Chiropractors: _____	\$ _____
_____	\$ _____
_____	\$ _____
Clinics: _____	\$ _____
_____	\$ _____
_____	\$ _____
Hospitals: _____	\$ _____
_____	\$ _____

Transportation & Lodging \$ \_\_\_\_\_ Insurance Premiums (include Medicare) \$ \_\_\_\_\_

Prenatal Care	\$ _____	Postnatal	\$ _____
Eyeglasses	\$ _____	Hearing Aids	\$ _____
X-Rays	\$ _____	Lab Fees	\$ _____
Medical Lodging	\$ _____	Bandages	\$ _____
Therapy Equipment	\$ _____	Crutches	\$ _____
Medical Supplies & Appliances	\$ _____	Diabetic Expense	\$ _____
Prosthesis Expense	\$ _____	Therapy Pool	\$ _____
Required Air Conditioning Expense	\$ _____	Electrical Expense	\$ _____
Repairs & Filters	\$ _____	Stop Smoking Expense	\$ _____

**TAXES**

Did you pay State Taxes last year? \_\_\_\_\_ How much? \$ \_\_\_\_\_ Did you pay State Taxes last year for prior years? \_\_\_\_\_ How much? \$ \_\_\_\_\_ Did you pay Sales Taxes on Major Purchases last Year? \_\_\_\_\_ How much? \$ \_\_\_\_\_

Auto License Fees	\$ _____	Auto Sales Tax	\$ _____
Real Estate Taxes	\$ _____	Property Taxes	\$ _____
Irrigation Taxes	\$ _____	Personal Property Taxes	\$ _____
Boat Taxes	\$ _____	Other Taxes	\$ _____

Did you buy any cars, boats, motorcycles, R.V.s, trailers, mobile homes, airplanes, etc.? \_\_\_\_\_ (Attach Information.)

## DEDUCTIONS (CONTINUED)

**INTEREST:** (Attach all 1098s)

1ST HOME	NAME	AMOUNT	2ND HOME	NAME	AMOUNT
Mortgages.....	_____	\$ _____	Mortgages.....	_____	\$ _____
2nd Home Mortgage..	_____	\$ _____	2nd Home Mortgage...	_____	\$ _____
Late Charges.....	_____	\$ _____	F.H.A. Charges	_____	\$ _____
Mortgage Insurance...	_____	\$ _____	Real Estate Loan Fees	_____	\$ _____
College Loan Interest	_____	\$ _____	Points .....	_____	\$ _____
College Loan Interest	_____	\$ _____	College Loan Interest	_____	\$ _____

**CONTRIBUTIONS**

Churches	\$ _____	Payroll Deductions	\$ _____
Missions	\$ _____	Youth Programs	\$ _____
Evangelists	\$ _____	Muscular Dystrophy	\$ _____
Bazaar	\$ _____	Salvation Army	\$ _____
Public Schools	\$ _____	County Fairs	\$ _____
Jaycees	\$ _____	Boy - Girl Scouts	\$ _____
Heart Fund	\$ _____	Xmas / Easter Seals	\$ _____
Cancer Fund	\$ _____	United Way	\$ _____

Did you donate any non - cash items such as food or used clothing? Please list description and value: \_\_\_\_\_

**CONTINUED EDUCATION & 1ST TWO YEARS COLLEGE STUDENT CREDIT**

Name of Student	_____	Travel Expense	\$ _____
Name of Institution	_____	Tuition Expense	\$ _____
Education Purpose	_____	Supplies Expense	\$ _____
Dates Attended	_____		

Name of Student	_____	Travel Expense	\$ _____
Name of Institution	_____	Tuition Expense	\$ _____
Education Purpose	_____	Supplies Expense	\$ _____
Dates Attended	_____		

Did you or your spouse contribute to a REGULAR IRA, ROTH IRA, SIMPLE or KEOGH ? \$ \_\_\_\_\_

Do you or your spouse have a retirement plan at work ? \_\_\_\_\_

Did you pay alimony ? \_\_\_\_\_

What date was your divorce decree determined to pay alimony? \_\_\_\_\_

How much ? \_\_\_\_\_

Recipients Name & S. S. # \_\_\_\_\_

**DECLARATION :**

I have provided the information on this form to the best of my knowledge and hereby declare it is complete and ready for the preparation of my/our income tax returns. Where business deductions shown, I acknowledge having spent these amounts and have kept a log or diary of such activities, pursuant to section 274(a) and can fully substantiate such deductions.

\_\_\_\_\_  
SIGNATURE (must be signed)

\_\_\_\_\_  
DATE