Tax Therapy, LLC
TY2021 Individual Tax Preparation
Annual Client Interview

This interview must be completed before I begin work on your return. It is designed to help ensure that I have all of the information necessary to complete your return before beginning data entry. If you have questions about an item of income or a deduction please include them in the space(s) available. *Questions submitted by phone, e-mail, or secure message will cause delays in return processing.*

Please take your time and complete the interview as thoroughly and accurately as possible.

If you are a returning client please enter the Driver's License information to ensure that what is on file is up to date. Please make updates to your physical address, e-mail address, and phone number(s) if they have changed. If you are a returning client we have your SSN and your dependents' SSN information (if applicable) on file. You only need to complete those items if you have added a dependent, removed a dependent, or changed your legal name.

General Information

Primary		**Spouse**	
Name:		Name:	
Date of Birth:		Date of Birth:	
SSN:		SSN:	
DL#	State:	DL#	State
Issued:	Expires:	Issued:	Expires:

Address:		
City	State	ZIP
E-mail:		Phone:

Foreign Accounts & Cryptocurrency

☐ I **do not** own crypto or virtual currency

☐ I **do not** own or have signature authority on non-US financial accounts

☐ I have NFTs

☐ I have money in online gaming accounts

☐ I own other foreign assets (property, etc.)

☐ I have relatives living in another country

Banking Information

☐ Please deposit my refund(s) to my bank account.

☐ Please debit my bank account for any balance(s) due on _______________*
If no date entered the amount will be debited on the 10th of the month of the applicable filing deadline.

Bank Name ☐ Checking ☐ Savings

Routing #: Account #:

Economic Impact Payment Information

☐ I received my Third Economic Impact Payment (stimulus money). *Please attach Letter 6475.*

☐ I did not receive an Economic Impact Payment or I don't think the payment amount was correct.

Dependents (if you have more than four please attach a list)

☐ I received advance payments of the Child Tax Credit. *Please attach Letter 6419.*

Name:	Name:
Relationship	Relationship:
Date of Birth:	Date of Birth:
SSN:	SSN:
# Days in Home	# Days in Home

Name:	Name:
Relationship	Relationship:
Date of Birth:	Date of Birth:
SSN:	SSN:
# Days in Home:	# Days in Home:

Estimated Payments

Please provide dates and amounts. Attach the stubs from your payment vouchers if available. *Do not include payments for federal or state balances due made in 2021.*

Federal Estimated Tax Payments	Qu1	Qu2	Qu3	Qu4
State Estimated Tax Payments	Qu1	Qu2	Qu3	Qu 4

Notes:

Income (Check all that apply. Attach W2s, 1099s, K1s as appropriate.)

☐ Wages/Unemployment
☐ Contractor/Non-employee Compensation
☐ Gig Economy (uber, task rabbit, etc.)
☐ Personal Property Rentals (AirBnB, etc.)
☐ Social Security/Retirement
☐ Interest/Dividends
☐ Partnership or Corporate Interests
☐ Gambling, Hobby, or Other (describe)

Notes:

Income Continued (Check all that apply. Attach 1099 as appropriate.)

☐ Small Business Income (Sch C)
☐ Rental or Royalty Income (Sch E)
☐ Farm or Ranch Income (Sch F)
☐ Bought/Sold Real Property
☐ Bought/Sold Stocks/Bonds
☐ Bought/Sold Cryptocurrency
☐ Cancelled Debt
☐ Bought or Cashed Savings Bonds
☐ Other (describe)

Please include income/expense worksheets and other information as appropriate.

Notes:

Deductions (Check all that apply.)

☐ State/Local Income Taxes and/or Property Taxes (primary residence, vacation home, land, etc.)
☐ Mortgage/Investment Interest
☐ Substantial Out of Pocket Medical (insurance premiums, prescriptions, co-pays, etc.)
☐ Major Purchases (car, boat, RV, large repairs or remodeling, etc.)
☐ Student Loan Interest
☐ Tuition and Fees for Post-secondary Education
☐ IRA Contributions (Traditional or Roth)
☐ Daycare or Dependent Care Expenses
☐ Other (educator expenses, charitable contributions, renewable energy/solar system, etc.)

Other Information

☐ Household employees (regular staff)

☐ Foreclosure or Bankruptcy

☐ Worked in a state or states other than your resident state (list)

☐ Adopted a child

Additional Notes, Questions, Information

Notes: