

Client Check List

Print Name _____

Did you receive the round 3 stimulus check?

Yes No

*If yes, provide (March – April 2021) amount _____

Did you receive any advance on the child tax credit?

Yes No Amount(s) _____

*If yes, please provide Form 6419

Did you have more than \$10,000 in a foreign account at any point in 2021?

Yes No Initial _____

*If yes, please provide transaction details for the tax year

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?

Yes No Initial _____

*If yes, please provide transaction details for the tax year

Did you have Health Savings Account (HSA) withdrawals in 2021?

Yes No

*If yes, please provide 1099SA

Did you sell any real estate in 2021?

Yes No

*If yes, please provide closing documents (1099-S)

Amount Paid for Vehicle Registration _____

Marital Status Changes (as of 12/31/2021)?

Yes No

*If yes, please explain _____

Dependent Changes?

Yes No

*If yes, please explain _____

Address Changes?

Yes No

*If yes, please list _____

*County of Residence _____

*School District of Residence _____

*Public School Fees (School Sponsored Activities) _____

***Taxpayer Email Address:** _____

***Spouse Email Address:** _____

***Taxpayer Phone:** _____ **Spouse Phone:** _____

Office Use Only
____ Driver's License
____ E Signature
Docs- Mail Pickup
Call Emailed Pickup
