

# 2021 Taxpayer Information Sheet

Please have the taxpayer fill out this sheet correctly and legibly to ensure a quick and accurate refund. Double check all information. The spelling of all names and social security numbers should match what is on the social security cards.

## Taxpayer Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

SSN \_\_\_\_\_ - - \_\_\_\_\_ DOB \_\_\_\_\_ / / \_\_\_\_\_ Occupation \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Cell Phone \_\_\_\_\_ - - \_\_\_\_\_ Email \_\_\_\_\_ @ \_\_\_\_\_

Marital Status on 12/31/2021

Can anyone claim this person as a dependent?

Married  Single, Divorced, or Widowed  Yes  No

## Spouse Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

SSN \_\_\_\_\_ - - \_\_\_\_\_ DOB \_\_\_\_\_ / / \_\_\_\_\_ Occupation \_\_\_\_\_

Can anyone claim this person as a dependent?

Yes  No

## Required Information

# of W-2's \_\_\_\_\_ # of 1099 NEC \_\_\_\_\_ Do you have any other income?  No  Yes

If yes, describe: \_\_\_\_\_

How much was your third stimulus (EIP3) amount (before any offset)? \_\_\_\_\_

This amount can be found on Notice 6475 from the IRS

Did you receive any advance child tax credit payments?

No  Yes If yes: For how many dependents? \_\_\_\_\_

What is the total amount received? \_\_\_\_\_

This amount can be found on Notice 6475 from the IRS

Did you or anyone on your return have marketplace insurance at any point during the year?

No  Yes If yes, you are required to provide your 1095A.

*I the undersigned, hereby certify that all the information provided above is true and correct.*

Taxpayer Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse Signature \_\_\_\_\_ Date \_\_\_\_\_