

Thomas P Crowley, CPA
2021 Returning Client Information

Date Received _____

Taxpayer Name(s) _____
Home # _____
Taxpayer Work # _____ Taxpayer Cell # _____ Taxpayer Email _____
Spouse Work # _____ Spouse Cell # _____ Spouse Email _____

Please provide any change in your address _____

Did your filing status (marital) change? If so, please provide your new status _____

Dependents

Do you need to add or delete any dependents during 2021? If so, please list below:

Add ___ Delete ___ Name: _____ SS# _____ DOB _____ Relationship: _____

Add ___ Delete ___ Name: _____ SS# _____ DOB _____ Relationship: _____

* If a dependent is over 18, can you still claim them? Yes _____ No _____

Health Insurance

Did you purchase Obamacare health insurance through the marketplace for yourself and all claimed dependents?

Yes ___ No ___ If so, please provide **Form 1095A**

***Failure to provide Form 1095A may result in IRS penalties.

Identity Theft requirements: In order to comply with Alabama's mandatory identity theft protection laws, please provide a copy of current driver's licenses for you and your spouse (if applicable.)

NOTE: If we are preparing a child's tax return and he/she is 16 years or older, a copy of their current driver's license is required.

If you want your refund directly deposited into your bank account, please provide:

Bank Name _____ Indicate type of acct: Checking ___ Savings ___

Routing # _____ Acct # _____

***If you want to use the banking information that was used for 2020, please initial here _____

Please answer the following questions.

Did you purchase items on the internet that you did not pay sales tax on? Yes ___ No ___ If yes, total \$ _____

Was anyone in your family enrolled in college in 2021? Yes ___ No ___ *If yes, please provide copy of Form 1098T*

Did you receive the stimulus in Spring, 2021? Yes ___ No ___ If yes, how much did you receive? _____

Did you receive the advanced child tax credit? Yes ___ No ___

***If yes, please provide copy of IRS letter #6419 to us.

******Taxpayer Engagement Certifications ******

*The information furnished to Thomas P Crowley, CPA PC for preparing my 2021 tax returns is true and correct to the best of my knowledge.

*I realize that the accuracy of my returns is my responsibility.

*Thomas P Crowley, CPA PC, was engaged to prepare my 2021 tax returns and only those returns. Any other services to be performed would be covered under a separate agreement.

*If I use the Client Portal, I will receive my client copy in the portal.

Taxpayer Signature _____

Spouse Signature _____

Date _____

Date _____