

Tax Filing Questionnaire

- Who is filing?
 - Name _____
 - Date of Birth _____
 - SSN _____
 - Phone # _____
- Spouse?
 - Name _____
 - Date of Birth _____
 - SSN _____
- What tax years do you need filed?
 - 2021 _____
 - 2020 _____
 - 2019 _____
 - Prior _____
- Has your marital status changed?
 - Date _____
 - Change _____
- Did you have any children
 - Date of Birth _____
 - Name _____
 - SSN _____
 - Date of Birth _____
 - Name _____
 - SSN _____
 - Date of Birth _____
 - Name _____
 - SSN _____
- Has your address changed?
 - Date _____
 - Address _____
 - Closing statement _____
- Did you purchase a new vehicle/boat/trailer?
 - Date _____
 - Bill of sale _____
- Do you have medical insurance?
 - Furnished by employer _____
 - Purchased through market place _____
 - Form 1095-a _____
- Did you work for someone/ a company?
 - W-2 _____
 - 1099 _____
- Did your spouse work for someone/ a company?
 - W-2 _____
 - 1099 _____

- Did you receive un-employment?
 - 1099G_____
- Did your spouse receive un-employment?
 - 1099G_____
- Did you receive Social Security benefits?
 - 1099SA_____
- Did your spouse receive Social Security benefits?
 - 1099SA_____
- Did you receive any retirement income?
 - 1099R_____
- Did your spouse receive any retirement income?
 - 1099R_____
- Did you start a business?
 - Financial information_____
 - Do you want us to compile your receipts into financial data?_____
- Do you have a small business?
 - Financial information_____
 - Do you want us to compile your receipts into financial data?_____
- Do you own a farm?
 - Financial information_____
 - Do you want us to compile your receipts into financial date?_____
- Do you have any a rental income?
 - Financial information_____
 - Do you want us to compile your receipts into financial date?_____
- Do you have a mortgage?
 - 1098_____
 - Property tax statement_____
- Do you have any medical expenses?
 - Doctors_____
 - Hospital_____
 - Medication_____
 - Premium_____
 - Mileage_____
- Do you have any charitable donations?
 - Contribution statement_____
 - Clothing or goods_____
- Did you contribute to a retirement account?
 - 401k_____
 - IRA_____
 - Roth IRA_____
- Did you repay any student loans?
 - 1098E_____
 - December/January statement_____

- Are you or a dependent currently in college?
 - 1098T_____
 - Books_____
 - Computer_____
 - Other expenses_____
- Did you use a college fund to pay for school?
 - Cloverdale 1099Q_____
 - 529 plan 1099Q_____
 - EE Savings bonds 1099int_____
- Did you pay for childcare?
 - Name_____
 - SSN_____
 - Amount_____
 - Dependent Name_____
- How much did you receive in stimulus payments? _____
- How much did you receive in advance child tax credit? _____
- What questions do you have?
 - _____
 - _____
 - _____
- How did you hear about Ray County Accounting & Tax?
 - Facebook_____
 - Website_____
 - Referral_____
 - Other_____
- Do you want to receive your refund direct deposit?
 - Bank Account Number_____
 - Routing Number_____

PLEASE PROVIDE THE PRIOR 2 YEARS OF TAX RETURNS

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<https://www.facebook.com/RAYCOACCT/>