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| **Tax Questionnaire – All Taxpayers Must Answer if Not Completing Full Tax Organizer** | *Return will not be started if unanswered* |
| Yes |  | No |  | Did you purchase or sell a main home during the year?*If yes, provide the closing statement* |
| Yes |  | No |  | Did you refinance a mortgage or take a home equity loan?*If yes, provide details* |
| Yes |  | No |  | Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?*If yes, How much*  |
| Yes |  | No |  | Did you make any new energy-efficient improvements to your home?*If yes, provide detail and cost* ***(This credit can be taken each year for up to $1,200)*** |
| Yes |  | No |  | Did you purchase a new energy-efficient car, truck, or van?*If yes, provide detail and cost* |
| Yes |  | No |  | Are you a member of the military?Sate of residency: |
| Yes |  | No |  | Did you provide driver’s license or state-issued photo ID for you and your spouse (if filing joint) if you are a new client or a returning client with a new license? Our office can scan your id. |
| Yes |  | No |  | Did all members of your household have healthcare coverage all year?*If yes, and you received your coverage through the Marketplace please provide a copy of your 1095-A.* |
| Yes |  | No |  | Were any children born or adopted in 2022?*If yes, provide statement for other expenses and complete the Dependent Children on the back side of this form* |
| Yes |  | No |  | Were any children attending college?*If yes, provide Form 1098-T and any other mandatory expenses* |
| Yes |  | No |  | Did you or your spouse receive unemployment? *If yes, you must provide a copy of your 1099-G.* |
| Yes |  | No |  | Did you receive any payments from a pension, profit sharing, or 401(k) plan?*If yes, you must provide a copy of your 1099-R.* |
| Yes |  | No |  | Did you receive any Social Security benefits?*If yes, you must provide a copy of your SSA-1099.* |
| Yes |  | No |  | Did you make any contributions to, withdrawals from, or execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?*If yes, you must provide documentation of the transaction.* |
| Yes |  | No |  | Did you receive any distribution from a Health Savings Plan (HSA), Archer MSA, or Medicare Advantage MSA during the year?*If yes, you must provide a copy of your 1099-SA.* |
| Yes |  | No |  | Were you, your spouse, or any dependents issued an Identity Protection PIN?*If yes, you must provide Notice CP01A from the IRS.* |
| Yes |  | No |  | Did you receive (as a reward, award, or payment for property or services), sell, send, exchange, or otherwise dispose of a digital asset? |
| Yes |  | No |  | Did you have any financial interest in or signature authority over a financial account or asset located in a foreign country? |
| Yes |  | No |  | Can you or your spouse be claimed as a dependent by someone else? |
| Yes   |  | No |  | Would you like to donate to the MN Non-Game Wildlife Fund. If you do, it will decrease your refund or increase what you owe. How much would you like to donate ­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Free Loon Common Loon vector and picture |

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| **Questions – Answer only if you are claiming**  | **Dependents** *(children or relatives)* | **Earned Income Credit** (EIC) | **Filing as Head of Household** |
| **EIC** | Can you provide documentation, if required, to substantiate your eligibility? | Yes |  | No |  | N/A |  |
| Were any of these credits disallowed or reduced in a prior year? | Yes |  | No |  | N/A |  |
| **Dependents** | Did you provide documentation of your child’s residence?*Examples include school records, healthcare provider statement, childcare provider record, medical record, social services record* | Yes |  | No |  | N/A |  |
| Were any of these credits disallowed or reduced in a prior year? | Yes |  | No |  | N/A |  |
| Is each qualifying person you are claiming a citizen, national, or resident of the US? | Yes |  | No |  | N/A |  |
| Did all the children you are claiming for the CTC or ACTC reside with you for 6+ months? | Yes |  | No |  | N/A |  |
| Is there an active Form 8332 (Release/Revocation of Release of Claim to Exemption for Child by Custodial Parent?) in place? | Yes |  | No |  | N/A |  |
| Did you release the claim for exemption to another person? | Yes |  | No |  | N/A |  |
| **Head of Household** | Can you provide documentation, if required, to substantiate your eligibility? | Yes |  | No |  | N/A |  |
| Were you unmarried or considered unmarried on the last day of the tax year? | Yes |  | No |  | N/A |  |
| Did your spouse live with you in the last 6 months of the tax year? | Yes |  | No |  | N/A |  |
| Did you provide more than half of the cost of keeping up your home?*Examples include mortgage/rent statements, utility bills, grocery bills, repair bills, property tax, home insurance* | Yes |  | No |  | N/A |  |
| Did your dependent *(child or relative)* live with you for more than half of the year? | Yes |  | No |  | N/A |  |
|  | *Signature* |  | *Date* |  |
| **Questions – Answer if** | **Returning Client - Only Provide Updates**  | **New Client – Complete Fully** |
| **PERSONAL** | **Taxpayer** | SSN |  |
| *First* | *M.I.* | *Last* | Email |  |
| Occupation |  | Date of Birth |  | Phone |  |
| Address |  | City |  | State |  | Zip |  |
| Driver’s License *No.* |  | *State* |  | *Issue Date* |  | *Exp. Date* |  |
| **Spouse** | SSN |  |
| First | M.I. | Last | Email |  |
| Occupation |  | Date of Birth |  | Phone |  |
| Address |  | City |  | State |  | Zip |  |
| Driver’s License *No.* |  | *State* |  | *Issue Date* |  | *Exp. Date* |  |
| Bank Information For | Direct deposit of refund |  | Direct debit of balanced due |  | *Bank Name* |  |
| *Checking* |  | *Savings* |  | *Routing number* |  | *Account Number* |  |
| Marital Status at 12/31/2021: | Single |  | Married |  | Separated |  | Widower |  |
| Were you divorced/separated during the year? | Yes |  | No |  | Were there any deaths in the family? | Yes |  | No |  |
| **DEPENDENTS** | Dependent children |
| *Child’s full name* | *Social Security Number* | *Date of birth* | *Months lived in home in 2021* | *Relationship to taxpayer* | *College Student?* |
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| Other dependents or people who lived with you |
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| Did any of the children have unearned income above $1100 for the year? | Yes |  | No |  |
| Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent in 2021? | Yes |  | No |  |
| Did you have childcare expenses during the year? If yes, provide daycare (name, taxpayer id, address) and amount paid for each child. | Yes |  | No |  |
| **Did you complete page 2 of this sheet if you are claiming a dependent, earned income credit, or head of household filing status?** | Yes |  | No |  |