Progressive Tax Service - Tax Year 2020 1803 Smizer Station Road, Fenton, MO 63026 (636) 225-3708

iote: items in g	gray that have not ch	ianged since last y							
Name:				SSN (you	SSN (yours)				
Street Address			SSN (spo	SSN (spouse)					
City, State & ZIP			Date of	Date of Birth (yours)					
Within St. Louis City Limits? Y N			Date of	Date of Birth (spouse)					
Primary Telephone			School D	School District					
axpayer's Ema	il Address								
pouse's Email									
				State:	Issue date:		Exp date:		
Taxpayer's Driver's License # Spouse's Driver's License #									
		.1 .100		State:	Issue date:		Exp date:		
•	ved any notice from				N				
larital Status a		Single	Marrie	d Separa	ited \(\bigcup\)	Nidow(er)			
id you divorce	or separate during	2020? Y N							
an you be claiı	med as a depent by	another taxpayer,	, such as a parer	nt? Y N					
Dependents: Do not list yourself or volume:		Birth Date:	SSN:	Relationship	Mor	nths lived in	College	student	
							Υ	N	
							Υ	N	
							Y	N	
o any of the cl	hildren have a disab te a different taxpay	ility? Y N yer will seek to cla	nim a child listed	·			Y N		
o any of the clood you anticipal Questions follower of the column of the	hildren have a disab te a different taxpay or ALL Taxpayers ers to both taxpayer	ility? Y N yer will seek to cla These ques and spouse; if un	nim a child listed tions MUST b sure, please ent	above as their depose answered. er "?"	pendent for tax	year 2020?		angod	
o any of the clooy on anticipal of the clook	hildren have a disab te a different taxpay or ALL Taxpayers ers to both taxpayer	ility? Y N yer will seek to cla These ques and spouse; if un	nim a child listed tions MUST b sure, please ent	above as their depote answered. er "?" sit? (Enter details be	pendent for tax	year 2020?		anged.	
o any of the clook you anticipal Questions for other of the control of the clook your reference of the clook your	hildren have a disabite a different taxpayor ALL Taxpayers ers to both taxpayer If you are due a re	ility? Y N yer will seek to cla These ques and spouse; if unsefund, would you	tions MUST busted sure, please enti- like direct depo	above as their depose answered. er "?" sit? (Enter details k	pelow if new.) F	year 2020?		anged.	
o any of the clooyou anticipa Questions foote "You" reference Y N Bank name Account typ Y N	r ALL Taxpayers ers to both taxpayer If you are due a re e: Would you like to	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking	tions MUST but tions MUST but tions	be answered. er "?" sit? (Enter details be Routing Account	pelow if new.) F	year 2020?	SAME if unch	_	
o any of the clooyou anticipa Questions foote "You" reference Y N Bank name Account typ Y N	r ALL Taxpayers ers to both taxpayer If you are due a re e: Would you like to	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund	tions MUST because the sure, please entilike direct depo	above as their depose answered. er "?" sit? (Enter details k	pelow if new.) F	year 2020?	SAME if unch	_	
y N Bank name Account typ Y N Y N	r ALL Taxpayers ers to both taxpayer If you are due a re e: Would you like to	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally bling	tions MUST because and like direct depo Savings into two accounts? If yes, who?	er "?" sit? (Enter details to Routing Account not or utilize direct	pelow if new.) F	year 2020?	SAME if unch	_	
o any of the clook you anticipal tuestions for the "You" refers on	or ALL Taxpayers ers to both taxpayer If you are due a re e: Would you like to Are you or your s Did you pay or red	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally bling	tions MUST because and like direct depo Savings into two accounts of the like direct depoints of the like direct	pe answered. er "?" sit? (Enter details be Routing Account nts or utilize direct	pelow if new.) F # # debit from abo	Please circle	SAME if unch	_	
y N Bank name Account typ Y N Y N	r ALL Taxpayers ers to both taxpayer If you are due a re Would you like to Are you or your se Did you pay or ree What date was	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur	tions MUST because the sure, please entilike direct depo Savings into two accounts of the sure of the	pe answered. er "?" sit? (Enter details to Routing Account nts or utilize direct AY or RECEIVE) d? public exchange (A	pelow if new.) F # # debit from abo	Please circle: Ove account: Amount: \$ Dient SSN: Act Markets	SAME if unch	nce due?	
o any of the clook you anticipal tuestions for the "You" refers on	or ALL Taxpayers ers to both taxpayer If you are due a re E: Would you like to Are you or your s Did you pay or ree What date was Did you purchase Will there be sign	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur	tions MUST because the sure, please entering like direct depo Savings into two accounts like the sure, who? O21? (circle: Proparation finalized ance through a income or deduction street income or deductions and sure income or deductions in the sure income or dedu	pe answered. er "?" sit? (Enter details to Routing Account and a rutilize direct area area area area area area area are	pelow if new.) F # # debit from abo Recip ffordable Care uch as retiremen	Please circle : Amount: \$ pient SSN: Act Marketpent?	SAME if unch to pay a bala place or Obar	nce due?	
o any of the clook you anticipal tuestions for the "You" refers on	or ALL Taxpayers ers to both taxpayer If you are due a re Example: Would you like to Are you or your sp Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ificant changes in	tions MUST because and like direct depo Savings into two accound? If yes, who? O21? (circle: Proparation finalized ance through a income or deductor dependents	pe answered. er "?" sit? (Enter details k Routing Account nts or utilize direct AY or RECEIVE) d? public exchange (A actions next year, s received an IP Pin	pelow if new.) F # # debit from abo Recip ffordable Care uch as retiremen	Please circle : Amount: \$ pient SSN: Act Marketpent?	SAME if unch to pay a bala place or Obar	nce due?	
y N Bank name Account typ Y N Y N	r ALL Taxpayers ers to both taxpayer If you are due a re Would you like to Are you or your s Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp Have you paid alt	ility? Y N yer will seek to cla These ques and spouse; if unsefund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ificant changes in pouse, or any of your ernative minimun	tions MUST because and like direct depo Savings into two accound? If yes, who? 021? (circle: Proparation finalized ance through a income or deducted tax (AMT) in an	er "?" sit? (Enter details be Routing Account nts or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, sereceived an IP Pin ny previous years?	pelow if new.) F # # debit from abo Recip ffordable Care uch as retirement from the IRS? F	Please circle: Amount: \$ Dient SSN: Act Marketpent? Please include	SAME if unch to pay a bala place or Obar	nce due?	
o any of the clop you anticipal tuestions for ote "You" reference of the clop	r ALL Taxpayers ers to both taxpayer If you are due a re Would you like to Are you or your sp Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp Have you pay an in	ility? Y N yer will seek to cla These ques and spouse; if unsefund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ificant changes in pouse, or any of your ernative minimun dividual for dome	tions MUST because and like direct deponds into two accound? If yes, who? O21? (circle: Proparation finalized ance through a income or deduction tax (AMT) in an stic services in y	er "?" sit? (Enter details ker) Routing Account nts or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, sereceived an IP Pin ny previous years?	pelow if new.) F # debit from abo Recip ffordable Care uch as retirement from the IRS? F	Please circle: Amount: \$ bient SSN: Act Marketpent? Please includ or the like)?	SAME if unch to pay a bala place or Obar	nce due?	
y N Bank name Account typ Y N Y N Y N Y N Y N Y N Y N Y	r ALL Taxpayers r ALL Taxpayers rs to both taxpayer If you are due a re Would you like to Are you or your sp Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp Have you paid alt Did you pay an ind Did you purchase	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ificant changes in pouse, or any of your ernative minimum dividual for dome a new energy-eff	tions MUST because the sure, please entrained like direct deportant Savings into two accounts of the sure through a income or deductor dependents on tax (AMT) in a stic services in y icient (electric)	er "?" sit? (Enter details to Routing Account ints or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, so received an IP Pin inty previous years? Four home (nanny, wehicle that is eligit	pelow if new.) F # # debit from abo Recip ffordable Care uch as retirement on the IRS? F housekeeping ble for a tax cre	Please circle: Amount: \$ pient SSN: Act Marketpent? Please include or the like)? dit?	SAME if unch to pay a bala place or Obar e letter if yes	nce due? naCare)?	
you anticipal vestions for the "You" reference "You "You "You "You "You "You "You "You	r ALL Taxpayers r ALL Taxpayers rs to both taxpayer If you are due a re Would you like to Are you or your sp Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp Have you paid alt Did you pay an ind Did you purchase	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally blind ceive alimony in 2 the divorce or sep your health insur ificant changes in ouse, or any of you ernative minimun dividual for dome a new energy-eff in bankruptcy, for	tions MUST because the sure, please entrained like direct deportant Savings into two accounts of the sure through a income or deductor dependents on tax (AMT) in a stic services in y icient (electric)	er "?" sit? (Enter details ker) Routing Account nts or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, sereceived an IP Pin ny previous years?	pelow if new.) F # # debit from abo Recip ffordable Care uch as retirement on the IRS? F housekeeping ble for a tax cre	Please circle: Amount: \$ pient SSN: Act Marketpent? Please include or the like)? dit?	SAME if unch to pay a bala place or Obar e letter if yes	nce due? naCare)?	
y N Bank name Account typ Y N Y N Y N Y N Y N Y N Y N Y N Y N Y N	r ALL Taxpayers r ALL Taxpayers rs to both taxpayer If you are due a re Would you like to Are you or your sp Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp Have you paid alt Did you purchase Are you involved Are you a membe	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ificant changes in pouse, or any of you ernative minimun dividual for dome a new energy-eff in bankruptcy, for er of the military?	tions MUST because entering sure, please entering like direct deport Savings into two accounts of the sure of the	er "?" sit? (Enter details to Routing Account ints or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, so received an IP Pin inty previous years? Four home (nanny, wehicle that is eligit	pelow if new.) F # # debit from abo Recip ffordable Care uch as retirement from the IRS? F housekeeping ple for a tax cre r debt (includin	Please circle: Amount: \$ pient SSN: Act Marketpent? Please include or the like)? dit?	SAME if unch to pay a bala place or Obar e letter if yes	nce due? naCare)?	
you anticipal vestions for the "You" reference of the "You" referenc	r ALL Taxpayers ers to both taxpayer If you are due a re Would you like to Are you or your s Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp Have you paid alt Did you pay an ind Did you purchase Are you involved Are you a membe Do you own or ha Did you receive th	ility? Y N yer will seek to cla These ques and spouse; if unsefund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ificant changes in pouse, or any of your ernative minimum dividual for dome a new energy-eff in bankruptcy, for er of the military? eve financial interes the third economic	tions MUST because your please entered like direct deport of the savings into two accounts of the saving of the sa	er "?" sit? (Enter details be Routing Account nts or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, so received an IP Pin ny previous years? Your home (nanny, vehicle that is eligible session, or had any oank account or fin at (Spring, 2021)? T	pelow if new.) F # # debit from abo Recip ffordable Care uch as retirement from the IRS? F housekeeping ble for a tax cre debt (includin ancial account otal amount re	Please circle: Amount: \$ Dient SSN: Act Marketpent? Please includ or the like)? dit? g credit card	SAME if unch to pay a bala blace or Obar e letter if yes s) cancelled?	nce due? naCare)?	
y N Bank name Account typ Y N Y N Y N Y N Y N Y N Y N Y N Y N Y N	hildren have a disabite a different taxpayor ar ALL Taxpayers ers to both taxpayer If you are due a rewise. Would you like to Are you or your spid you pay or rewise. Will there be sign Have you, your spid you pay an indicate you purchase Are you involved Are you a member Do you own or had Did you receive the Would you like to	ility? Y N yer will seek to cla These ques and spouse; if und efund, would you Checking split your refund pouse legally blind ceive alimony in 2 the divorce or sep your health insur- ificant changes in bouse, or any of your ernative minimun dividual for dome a new energy-eff in bankruptcy, for er of the military? eve financial intered allow your tax pr	sure, please entrollike direct depo Savings into two accounts: O21? (circle: Proparation finalized ance through a income or deductour dependents in tax (AMT) in an stic services in y icient (electric) in the court of the cour	er "?" sit? (Enter details be Routing Account of RECEIVE) d? public exchange (Auctions next year, so received an IP Pin ny previous years? Four home (nanny, wehicle that is eligible session, or had any pank account or fin	pelow if new.) F # # debit from abo Recip ffordable Care uch as retirement from the IRS? F housekeeping ble for a tax cre debt (includin ancial account otal amount re	Please circle: Amount: \$ Dient SSN: Act Marketpent? Please includ or the like)? dit? g credit card	SAME if unch to pay a bala blace or Obar e letter if yes s) cancelled?	nce due? naCare)?	
o any of the cloop you anticipal questions for ote "You" reference of the cloop of	e: Would you like to Did you pay or rec What date was Did you pay or rec What date was Did you purchase Will there be sign Have you, your sp Have you paid alt Did you pay an ind Did you purchase Are you involved Are you a membe Do you own or ha Did you receive th Would you like to Were any children	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally blind ceive alimony in 2 the divorce or sep your health insur ificant changes in bouse, or any of you ernative minimum dividual for dome a new energy-eff in bankruptcy, for er of the military? eve financial intere the third economic allow your tax pr n born or adopted	tions MUST because the direct deponds into two accounts of the direct deponds into two accounts of the direct deponds of the direct deponds of the direct dependents of the direct dependent de	er "?" sit? (Enter details to Routing Account Ints or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, so received an IP Pin Inty previous years? Four home (nanny, wehicle that is eligible session, or had any oank account or fin int (Spring, 2021)? To so this return with the	Reciping for tax debit from about the IRS? For a tax created and an account otal amount recipied and the IRS, should	Please circle: Amount: \$ bient SSN: Act Marketpent? Please include or the like)? dit? g credit card ceived: \$ it be necessa	SAME if unch	nce due? naCare)?	
o any of the cloop you anticipal operations for the "You" reference of the "You" reference	e: Would you like to What date was Did you pay or ree Will there be sign Have you, your sp Have you paid alt Did you pay an ind Did you purchase Are you or wourd and Will there be sign Have you, your sp Have you, your sp Have you paid alt Did you pay an ind Did you purchase Are you involved Are you a membed Do you own or ha Did you receive the Would you like to Were any children Do any dependen	ility? Y N yer will seek to cla These ques and spouse; if une efund, would you Checking split your refund pouse legally blind ceive alimony in 2 the divorce or sep your health insur ificant changes in pouse, or any of your ernative minimun dividual for dome a new energy-eff in bankruptcy, for er of the military? eve financial intere the third economic of allow your tax pr in born or adopted at children have un	tions MUST because please entilike direct deport Savings into two accounts of the country of the	er "?" sit? (Enter details to Routing Account ints or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, so received an IP Pin inty previous years? rour home (nanny, vehicle that is eligible session, or had any oank account or fin int (Spring, 2021)? The se of \$1,100 or more	Recipifordable Care uch as retirement for a tax creivides of the IRS? For thousekeeping one for a tax creivides (including ancial account otal amount rethe IRS, should be (such as investigation).	Please circle: Amount: \$ Dient SSN: Act Marketpent? Please includ Or the like)? Idit? Idit? Idit? Idit? Idit card Inceived: \$ It be necession	SAME if unch to pay a bala place or Obar e letter if yes s) cancelled? ary?	naCare)?	
o any of the cloop you anticipal questions for ote "You" reference of the cloop of	r ALL Taxpayers ers to both taxpayer If you are due a re Would you like to Are you or your sp Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp Have you paid alt Did you pay an in Did you purchase Are you involved Are you a membe Do you own or ha Did you receive th Would you like to Were any children Were any children	ility? Y N yer will seek to cla These ques and spouse; if unsefund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ificant changes in pouse, or any of your ernative minimun dividual for dome a new energy-eff in bankruptcy, for er of the military? eve financial interes a allow your tax pr n born or adopted a tchildren have un attending colleg	tions MUST because entering sure, please entering sure through a income or deduction dependents in tax (AMT) in an actic services in yicient (electric) where the sure sure sure sure sure sure sure sur	er "?" sit? (Enter details keep answered. er "?" sit? (Enter details keep account on the sor utilize direct and any previous years? Four home (nanny, wehicle that is eligible session, or had any and account or fine at (Spring, 2021)? The set this return with the end \$1,100 or more college?	Recipe for day and a second as retirement from the IRS? For debt (including ancial account otal amount reche IRS, should be (such as investigated).	Please circle: Amount: \$ bient SSN: Act Marketpent? Please includ or the like)? dit? g credit card ceived: \$ it be necessate tment incom 3rd 4	SAME if unch to pay a bala blace or Obar e letter if yes s) cancelled? ary? th Victory	naCare)?	
o any of the cloop you anticipal to you	r ALL Taxpayers ers to both taxpayer If you are due a re Would you like to Are you or your sp Did you pay or re What date was Did you purchase Will there be sign Have you, your sp Have you paid alt Did you pay an in Did you purchase Are you involved Are you a membe Do you own or ha Did you receive th Would you like to Were any children Additional inform	refund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ificant changes in pouse, or any of your ernative minimun dividual for dome a new energy-eff in bankruptcy, for er of the military? eve financial intered a allow your tax pr n born or adopted at children have un attending colleg attion will be need	sure, please entrollike direct depo Savings into two accounts of the sure of	er "?" sit? (Enter details keep Routing Account or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, seecived an IP Pinny previous years? Your home (nanny, wehicle that is eligible session, or had any eank account or finnt (Spring, 2021)? The set of \$1,100 or more college? t, including 1098T of the service of the s	Reciping of the Reciping of the IRS? For the IRS? For a tax created by the IRS, should be (such as investigation) and amount reciping of the IRS, should be (such as investigation) and amounts pand amo	Please circle: Amount: \$ bient SSN: Act Marketpent? Please includ or the like)? dit? g credit card ceived: \$ it be necessate tment incom 3rd 4	SAME if unch to pay a bala blace or Obar e letter if yes s) cancelled? ary? th Victory	naCare)?	
o any of the cloop you anticipal to you	r ALL Taxpayers ers to both taxpayer flyou are due a re would you like to Are you or your sp Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp Have you paid alt Did you pay an in- Did you purchase Are you involved Are you a membe Do you own or ha Did you receive th Would you like to Were any children Were any children Additional inform Did you pay tuitio	refund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ificant changes in pouse, or any of your ernative minimun dividual for dome a new energy-eff in bankruptcy, for er of the military? ere third economic allow your tax pr in born or adopted at children have un attending college atton will be need on for a private elec- er of or a private elec- er or	sure, please entralike direct depo Savings into two accounts of the control of t	er "?" sit? (Enter details to Routing Account ints or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, so received an IP Pin inty previous years? Four home (nanny, wehicle that is eligible session, or had any session, or had any session or more college? t, including 1098T of dary school for a desired.	Recipifordable Care uch as retirement the IRS? For a tax created the IRS, should be (such as investigated and amounts prependent?	Please circle: Amount: \$ bient SSN: Act Marketpent? Please include or the like)? dit? g credit card ceived: \$ it be necesses tment incom 3rd 4	SAME if unch to pay a bala blace or Obar e letter if yes s) cancelled? ary? th Victory	naCare)?	
O any of the class	r ALL Taxpayers ers to both taxpayer ers to both taxpayer ers to both taxpayer lif you are due a re e: Would you like to Are you or your sp Did you pay or ree What date was Did you purchase Will there be sign Have you, your sp Have you paid alt Did you pay an ind Did you pay like to Are you a membed Do you own or had Did you receive the Would you like to Were any children Do any dependen Were any children Additional inform Did you pay tuitio Did you or your sp	refund, would you Checking split your refund pouse legally bling ceive alimony in 2 the divorce or sep your health insur ifficant changes in pouse, or any of you ernative minimun dividual for dome a new energy-eff in bankruptcy, for er of the military? Ave financial interes the third economic allow your tax pr n born or adopted at children have un n attending college atton will be need on for a private ele pouse take college	tions MUST because the direct deponds into two accounts are through a income or deduction (electric) where the direct payment in a foreign because the direct payment	er "?" sit? (Enter details keep Routing Account or utilize direct AY or RECEIVE) d? public exchange (Auctions next year, seecived an IP Pinny previous years? Your home (nanny, wehicle that is eligible session, or had any eank account or finnt (Spring, 2021)? The set of \$1,100 or more college? t, including 1098T of the service of the s	Recipifordable Care uch as retirement from the IRS? For a tax created by the IRS, should the I	Please circle: Amount: \$ bient SSN: Act Marketpent? Please include or the like)? dit? g credit card ceived: \$ it be necesses tment incom 3rd 4	SAME if unch to pay a bala blace or Obar e letter if yes s) cancelled? ary? th Victory	naCare)?	

If so, we will need provider name, address, EIN and amounts paid.

	Υ	N	Did you contribute to a §529 plan in 2021? Amount:						
Home	Υ	N	Did you purchase or sell a home during the year? If yes, additional information including all closing stmts are needed.						
	Υ	N	If you sold a home, did you claim the First-Time Homebuyer Credit when purchased? If yes, provide details.						
	Υ	N	Did you refinance a mortgage or take a home equity loan? If yes, please provide closing statement.						
エ	Υ	N	Have you used mortgage loan proceeds for purposes other than to buy, build or substantially improve the home?						
	Υ	N	Did you make any new energy-efficient improvements to your home? If yes, provide details.						
	Υ	N	Do you own a business or an interest in a partnership, corporation, LLC, farming activity or other venture?						
ess			Please call our office if you need a self employed income worksheet.						
Business	Υ	N	Did you receive income from a sharing/gig economy activity such as AirBnB, Uber or Shipt?						
Bu	Υ	N	Did you have income from a rental property, farm, self employed business, gambling, legal settlements, disability,						
			or any other income? Please provide details (our office may have worksheet available for some income types).						
	Υ	N	Did you, or will you, contribute any money to an IRA for 2021?						
ts			Taxpayer Amount: Traditional \$ Roth IRA \$						
			Spouse Amount: Traditional \$ Roth IRA \$						
Investments	Υ	N	Did you rollover any amounts from a retirement account in 2021?						
] tr	Υ	N	Did you sell or transfer any stock or sell rental or investment property in 2021?						
ve	Υ	N	Did you receive any income from an installment sale?						
⊆ [Υ	N Did you have any investments that became worthless in 2021?							
	Υ	N	Did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency?						
	Υ	Were you granted, or did you exercise, any employee stock options during 2021?							
	Υ	N	Did you/will you make a contribution to an HSA for 2021 (due by 4/18/2022) or distributions from an HSA?						
Other	Υ	N	Did you pay any interest on a loan for a boat or RV that has full living quarters? If yes, provide details.						
Off	Υ	N Did you make any charitable contributions in 2021? If so please provide details.							
	Υ	N	Did you pay sales taxes on a major purchase in 2021, such as a vehicle, boat or RV?						

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements and other forms, as well as interviews and conversations with our clients. We may also review banking and credit card information in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or **obtained with your permission.**

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will **NOT** disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

Certification/Signatures

I/We certify that the information provided for our tax preparation service is true and complete to the best of my/our knowledge.

Taxpayer	Date
Spouse	Date