General: 1040	Personal	Information		
Filing (Marital) status code (1 = Single, 2 = Married filing joint,	3 - Married filing separate 4 :	- Head of household 5 - Qualifying	a widow(er))	
Mark if you were married but living apart all year		ark if your nonresident alie		o on ITIN
Mark if you were married but living apart all year	IVI	=	in spouse does not have	
		Taxpayer		Spouse
Social security number				
First name				
Last name				
Occupation				
Designate \$3.00 to the presidential election campaign	fund? (1 = Yes, 2 = No, 3=	Blank) <u>2</u>		
Mark if legally blind				
Mark if dependent of another taxpayer				
Taxpayer between 19 and 23, full-time student, with ir	ncome less than 1/2 su	pport? (Y. N)		
Date of birth				
Date of death				
Work/daytime telephone number/ext number				
Do you authorize us to discuss your return with the IR	S (V NI)			
·	O (1, N)	_		
General: 1040, Contact	Present Ma	iling Address		
Address				
	_			
Apartment number				
City/State postal code/Zip code	_			_
Foreign country name				
Foreign phone number				
Home/evening telephone number				
Taxpayer email address				
Spouse email address				
General: 1040				
General. 1040	Dependent	Information		
				Care
				Months expenses
First Name Last Name	Date of Birth	Social Security No.	Relationship	in paid for home dependent
i ii st Name Last Name	Date of Biltin	oocial occurity No.	Neiationsinp	nome dependent
Credits: 2441	Child and Danas	dant Cara Evranasa		
	Child and Depen	dent Care Expenses		
Provider information:				
Business name				
First and Last name				
Street address				
City, state, and zip code				
Social security number OR Employer identification r	number			
Tax Exempt or Living Abroad Foreign Care Provide	r (1 = TE, 2 = LAFCP)			
Amount paid to care provider in 2021				_
·			Taxpayer	Spouse
Employer-provided dependent care benefits that were	forfeited			
Credits: AdvCTC		B		
A	dvanced Child Ta	ax Payments		
			Taxpayer	Spouse
Advanced Child Tax Payments received (Letter 6/10)				openes.
Advanced Child Tax Payments received (Letter 6419)	•			
July				
August				
September				
October				
November				
December				
			Lite-1	GENERAL INFORMATION

Credits: Rebate

Economic Impact Payment (EIP)/Stimulus Payment

Please provide all copies of Notice 1444-C that you receive.

Look up	your EIP3 amount by creating or viewing your IRS online account at https:	//www.irs.g	ov/payments/	view-your-tax-ac	count
		Тахр	ayer	Spous	е
•	ct payment(s) 3 (EIP3) received or spouse, if married, was member of US Armed Forces in 2021				
Income: W2	Salary and Wages				_
Below is	Please provide all copies of Form W-2 that y a list of the Form(s) W-2 as reported in last year's tax return. If a particular	ou receive W-2 no loi	nger applies, n	mark the not appl	licable box.
T/S	Description		Prior Year Information	Mark if no lo applicab	onger
_				. <u>—</u>	
_				<u> </u>	
_				· —	
Retirement: 1099R				_	
Retirement. 10991	Pension, IRA, and Annuity Distri	butions			
Below is a l	Please provide all copies of Form 1099-R tha ist of the Form(s) 1099-R as reported in last year's tax return. If a particular	t you receiv r 1099-R no	ve. Ionger applie	s, mark the not a	pplicable box.
T/S	Description		Prior Year Information	Mark if no lo applicab	
_	·			· —	
				·	
Income: K1, K1T	Schedules K-1				
Below is a	Please provide all copies of Schedule K-1 tha I list of the Schedule(s) K-1 as reported in last year's tax return. If a particu	ıt you recei lar K-1 no l	ve. onger applies	, mark the not ap	plicable box.
T/S/J	Description		Form	Mark if no lo applicab	onger
				——	ie
_				_	
_				_	
Income: W2G	Gambling Income				
Below is a	Please provide all copies of Form W-2G that list of the Form(s) W-2G as reported in last year's tax return. If a particular			. mark the not an	plicable box.
			Prior Year	Mark if no lo	onger
T/S —	Description		Information	applicab . —	ie
				· <u>—</u>	
Educate: 1099Q	Qualified Education Plan Distrib	outions			
Below is a li	Please provide all copies of Form 1099-Q that ist of the Form(s) 1099-Q as reported in last year's tax return. If a particular			s, mark the not a	pplicable box.
T/S	Description		Prior Year Information	Mark if no lo applicab	
_				· —	
				<u> </u>	
		Lite-2	Rebate/W-2	2/1099-R/K-1/W-2	G/1099-Q

Income: B1	Interest Income						
	Please provide all copies of F	orm 109	99-INT or other state	ements reporting inter			
T/S/J	Payer I	Payer Name			Interest Income	Prior Year Information	
_							
				_			
Income: B3	Selle	r Fina	anced Mortgage	Interest			
-	J Payer's name 's address, city, state, zip code nt received in 2021			Payer's social securi	<u> </u>		
Income: B2		D:		_ Amount received in 2	.020		
	Please provide copies of all Fo		vidend Income	monto reporting divid	and income		
	·	orm 109	9-DIV or other state	oments reporting divide Ordinary	Qualifie	d Prior Year	
T/S/J	Payer Name			Dividends	Dividend	ds Information	
<u> </u>							
lassaus D					_		
Income: D				Investment Prope	erty		
		ide cop	oies of all Forms 109	(Bross Sales		
T/S/J	Description of Property		Date Acquired	Date Sold	Less expenses o	of sale) Other Basis	
						_	
_ =							
_ =							
Income: Inc	come		Other Income				
	Please provi	de copi	es of all supporting				
State	and local income tax refunds			2021 Inform	ation	Prior Year Information	
		T/S	Agreement Date	2021 Inform	ation	Prior Year Information	
Alimo	ny received						
			Taxpayer	Spouse		Prior Year Information	
	ployment compensation ployment compensation repaid						
Social	security benefits			-			
	are premiums to be reported on Schedule A ad retirement benefits	_					
T/S/	J			2021 Inform	ation	Prior Year Information	
	Other Income:						
			- 				
			Lite-3	INTEREST/DIVIDEND	S/CAPITAL	GAINS/OTHER INCOME	

Lite-4 ADJUSTMENTS/EDUCATE

1040 Adj: IRA

1010114	j. 11 0 (Adjustments to Ir	ncome - IRA Contri	ibutions		
		Please pro	ovide year end statements for each	account and any Form	8606 not prepare	ed by this office.	
					Taxpayer		Spouse
		A Contributions for					
•			ım allowable traditional IRA contributio	·			
		•	eductible only, 2 = Both deductible and nondeduction butions made for use in 2021	ble)		_	
		raditional IRA contrib ributions for 2021 -		-			
			aximum Roth IRA contribution				
-			is made for use in 2021			_	
Educate	. Educate	,	Higher Education	Deductions and/o	r Credits		
	Co		if you paid interest on a qualified s your spouse, or a person who was				ses for you,
T/S		C	Qualified student loan interest paid		2021 Informati	on Prior	Year Information
							_
-		ified education expe	e this section if you paid qualified e enses include tuition and fees requi Please provide		ttendance at an e		
	Ed Exp Code*	Student's SSN	Student's First Name	Student's Last	Name Q	ualified Expense	Prior Year s Information
—							
_	_ :						
	_ :						
	tudent	qualifies for the An	code: 1 = American opportunity creat nerican opportunity credit when ent ompleted the first 4 years of post-so	rolled at least half-time	in a program lea	ding to a degree,	certificate, or
1040 Adj	j: 3903		Job Relate	ed Moving Expense	es		
		Com	plete this section if you moved to a	new home due to serv	ice in the armed t	orces.	
Descripti							
		se/Joint (T, S, J)					
		e was due to service					_
		s from old home to n	•				
		s from old home to o	-				
		outside United State					_
-		and storage expense jing (not including me					
	_	eimbursed for moving	·				
rotal alli	ount it	ombarsea for moving	у схрепаса				
1040 Adj	j: OtherA	dj	Other Adju	stments to Income	е		
Alimon	ıy Paid	:					
T/S	Da	te*	Recipient name	Recipient SSN	2021 Info	ormation Pri	or Year Information
Street	addre	 ss					
City, S	State a	nd Zip code					
-		e/separation agreement date	e				
				Taxpayer	Spot	ıse Pri	or Year Information
Educa	tor exp	enses:					
Other	adjustr	nents:					

General: Bank

Direct Deposit/Electronic Funds Withdrawal Information

Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number, and type of account below. If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter information in the fields below. Note that electronic funds will be withdrawn only from the primary account listed below.

Primary account institution Name of financial institution Your account number Name of financial institution Your account furnisher Type of account (1 = Savings, 2 = Checking, 3 = RA*) Mark if financial institution is region based (not located in the territorial jurisdiction of the United States) Enter the maximum dollar amount, or percentage of total refund Secondary account #1: Financial institution routing transit number Name of financial institution in tumber Type of account (1 = Savings, 2 = Checking, 3 = RA*) Mark if financial institution Your account number Type of account (1 = Savings, 2 = Checking, 3 = RA*) Mark if financial institution (region based (not located in the territorial jurisdiction of the United States) Enter the maximum dollar amount, or percentage of total refund Secondary account #2: Financial institution is region based (not located in the territorial jurisdiction of the United States) Enter the maximum dollar amount, or percentage of total refund Secondary account #2: Financial institution is religiously and this is a joint account, (lich trappyer and spouse names are on the account) Mark if financial institution is selected. Your account number Type of account (1 = Savings, 2 = Checking, 3 = RA*) Mark if financial institution is foreign based (not located in the territorial jurisdiction of the United States) Enter the maximum dollar amount, or percentage of total refund Solar Professional States (1 = Checking, 3 = RA*) Mark if financial institution is foreign based (not located in the territorial purisdiction of the United States) Enter the maximum dollar amount, or percentage of total refund Solar Professional States (1 = Checking, 3 = RA*) Individual maximum dollar amount, or percentage of total refund Solar States (1 = Checking, 3 = RA*) Individual maximum dollar amount, or percentage of total refund Solar (1 = Checking, 3 = RA*) Solar States (1 = Checking, 3 = State issued Identification cerd, 3 = No applicable identification, 4 = Identification not provided) Identifica	Mark to verify all accounts listed below have been reviewed, updated as	needed, and are correct.	_
Name of financial institution is a joint account (sent suspeyer and spouse names are on the account) Mark if married filing jointly and this is a joint account (sent suspeyer and spouse names are on the account) Mark if financial institution for storeign based (Not coated in the territorial jurisdiction of the United States) Secondary account #1: Financial institution routing transit number Name of financial institution Your account number Type of account (1 = Savings, 2 = Checking, 3 = IRA*) Mark if financial institution Mark if financial institution for storeign based (Not coated in the territorial jurisdiction of the United States) Enter the maximum dollar amount, or percentage of total refund Dollar Secondary account #2: Financial institution routing transit number Name of financial institution Your account number Type of account (1 = Savings, 2 = Checking, 3 = IRA*) Mark if financial institution Your account number Type of account (1 = Savings, 2 = Checking, 3 = IRA*) Mark if married filing jointly and this is a joint account (8ch taspeyer and spouse names are on the account) Mark if financial institution Your account number Type of account (1 = Savings, 2 = Checking, 3 = IRA*) Mark if married filing jointly and this is a joint account (8ch taspeyer and spouse names are on the account) Mark if married filing jointly and this is a joint account (8ch taspeyer and spouse names are on the account) Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) Enter the maximum dollar amount, or percentage of total refund Dolar or Percent (xox.xx) **Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accopted by the bank or financial institution. **Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accopted by the bank or financial institution. **Refunds may only be direct deposited to	Primary account:		_
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Enter the maximum dollar amount, or percentage of total refund	Type of account (1 = Savings, 2 = Checking, 3 = IRA*)		_
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Financial institution routing transit number Name of financial institution Your account number Type of account (1 = Savings, 2 = Checking, 3 = IRA*) Mark if married filling jointly and this is a joint account (Both taxpayer and spouse names are on the account) Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) Enter the maximum dollar amount, or percentage of total refund Dollar "Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution. Electronic Filling: ID Auth Identity Authentication Taxpayer - Form of identification (1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) Identification number Issue date Expiration date Location of issuance Document number (New York only) Spouse - Form of identification (1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) Identification number Issue date Expiration date Location of issuance Document number (New York only)	Enter the maximum dollar amount, or percentage of total refund	Dollar	or Percent (xxx.xx)
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NOTES/QUESTIONS: