



ABBATE DEMARINIS, LLP

Certified Public Accountants & Consultants

QUESTIONNAIRE FOR 2021 TAXES

Name:

Telephone Number:

Email:

1. Did you pay estimated taxes?

If so, provide dates and amounts paid

2. Did you make any IRA or Traditional Roth Contributions for 2021?

If so, please provide amount and type

3. Do you contribute to a NY 529 or similar plan (College Funds)?

If so, make sure to include your statement

4. Do you have children in college?

If so, provide the 1098-T

5. Do you have long-term care?

If so, provide the amount paid (if married provide amounts paid separately)

6. Did you receive the third stimulus payments (after March 2021)?

If so, please provide amounts received separately (\$1400 per person)

7. Did you receive the advanced child tax credit (starting in July 2021)?

If so, please provide IRS letter for taxpayer and spouse (both are required)

8. Did you collect unemployment during 2021?

If so, please provide 1099-G

9. Did you have any changes to your family? (Married, divorced, new children)

If so, please provide details

10. Do you have any children under 13 that you pay for childcare?

If so, provide Name and Tax ID of Facility & Amount Paid

11. Did you have any residential changes: (Move, Buy, Sell, or Refi)

If so, please provide details (Closing Statement)

12. At any time during 2021 did you buy or sell any virtual currency (Coinbase)?

If any virtual currency was sold, please provide statement

13. Do you want direct deposit of a refund or auto withdrawal of taxes due?

If so, please provide bank account number and routing number

OTHER ITEMS TO INCLUDE WITH YOUR DOCUMENTS:

Copy of driver's licenses (front and back)

Real Estate taxes

Star rebate amount