

# Haukeness Tax & Accounting Inc

103 5<sup>th</sup> Ave N, Strum, WI 54770

www.haukeness.tax

Phone: (715) 695-2602 Fax: (715) 695-2675

## 2021 Client Questionnaire

### PERSONAL DATA

Taxpayer \_\_\_\_\_

Occupation \_\_\_\_\_

SSN \_\_\_\_\_ Birthdate \_\_\_\_\_

Phone \_\_\_\_\_ (Home/Work/Cell)

E-Mail \_\_\_\_\_

Spouse \_\_\_\_\_

Occupation \_\_\_\_\_

SSN \_\_\_\_\_ Birthdate \_\_\_\_\_

Phone \_\_\_\_\_ (Home/Work/Cell)

E-Mail \_\_\_\_\_

Address \_\_\_\_\_

**Provide proof of identity to be eligible to e-file your tax return (driver's license or state issued photo ID).**

- Single  Head of Household  Married  
 Divorced  Separated  Widow

Yes  No – Were you or your spouse a resident of another state or earned income in another state in 2021? Which State? \_\_\_\_\_

### DEPENDENTS

(Name, SSN, Birthdate, Months Lived in Home in 2021)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Yes  No – Can another person qualify to claim any of your dependents?

**Provide documentation for proof of dependent related credits (tuition, school records, medical records, daycare records, etc.)**

### STIMULUS (ECONOMIC IMPACT PAYMENT)

Yes  No - Did you receive a \$1,400/person Stimulus Payment? What was the amount your family received? \$\_\_\_\_\_ **Provide Form 1444-C from the IRS.**

### ESTIMATED TAX PAYMENTS

Did you apply an overpayment of your 2020 taxes to your 2021 estimated taxes? If yes, how much to State \$\_\_\_\_\_ Federal \$\_\_\_\_\_

Fill in any estimated tax payments made:

1<sup>st</sup> Qtr (April 15, 2021) State\$\_\_\_\_\_ Federal\$\_\_\_\_\_

2<sup>nd</sup> Qtr (June 15, 2021) State\$\_\_\_\_\_ Federal\$\_\_\_\_\_

3<sup>rd</sup> Qtr (Sept 15, 2021) State\$\_\_\_\_\_ Federal\$\_\_\_\_\_

4<sup>th</sup> Qtr (Jan 15, 2022) State\$\_\_\_\_\_ Federal\$\_\_\_\_\_

### INCOME – Check all that Apply

- Wages – **need W-2's**  
 Lottery or Gambling Winnings – **need W-2G**  
 Pension/Retirement – **need 1099-R**  
 Dividends – **need 1099-DIV**  
 Interest – **need 1099-INT**  
 Unemployment/Ag Payments – **need 1099-G**  
 Gov't or Ag Payments/Grants – **need 1099-G**  
 Independent Contractor – **need 1099-MISC/NEC**  
 Social Security – **need 1099-SSA**  
 Rental Income – **need 1099-MISC**  
 Sold Investment, Stocks or Bonds – **need 1099-B**  
 Cancellation of Debt – **need 1099-C**  
 Financial Interest in Virtual Currency (i.e. bitcoin) - **need 1099-B or 8949**  
 Sold Primary Residence  
 Owned Rental Property  
 Farm Income  
 Alimony (Paid or Received)  
 Contributions to IRA's  
 Distribution of Foreign Accounts  
 Disability

### DEDUCTIONS – Check all that Apply

- Child Care Expenses – **need Provider Name, Address, SSN, and Amount Paid to Provider**  
 College Tuition - **need 1098-T**  
 Student Loan Interest – **need 1098-E**  
 Contributions to 529 Education Plan  
 Mortgage Interest – **need 1098**  
 Un-reimbursed Medical expenses  
 Un-reimbursed Dental expenses  
 Cash Donations – **need documentation**  
 Non-Cash Donations – **need detailed statements if over \$500.**  
 Teacher Un-reimbursed Expenses  
 HSA – **need 1099-SA**  
 Paid Real Estate Taxes

**AFFILIATIONS**

Yes  No – Are you a part of a Corporation, Partnership, or Trust? **If yes, provide K-1's.**

**ADVANCE CHILD TAX CREDIT**

Yes  No – Did you receive advanced payments for the Child Tax Credit? **If yes, provide IRS Letter 6419.**

**RENTERS**

Yes  No - Did you rent during 2021 in Wisconsin? Monthly Rent Paid in 2021: \_\_\_\_\_ Number of Months Rented: \_\_\_\_\_

**PAYCHECK PROTECTION PROGRAM (PPP)**

Yes  No – If you or your spouse own a farm or business, did you receive a PPP loan? If yes, what amount did you receive? \_\_\_\_\_. Was the loan forgiven or have you applied for forgiveness? \_\_\_\_\_

**HEALTH CARE**

Yes  No – Did you or any member of your family receive healthcare coverage through the Marketplace? **If yes, provide Form 1095-A.**

Yes  No – Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year? **Provide 1099-SA.**

Yes  No – Did you pay any long-term care premiums for yourself, your spouse or a dependent during the year? If yes, what amounts? Taxpayer \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_

**MISCELLANEOUS**

Yes  No – Did you make any energy-efficient improvements to your main home during the year including, exterior windows and doors, insulation, HVAC, water heater, solar, geothermal or biomass furnace? **If yes, provide documentation.**

Yes  No – Did you make gifts to any one person in excess of \$15,000 during the year?

Yes  No – Do you want to have any refund or balance due directly deposited or withdrawn? **If yes, provide bank, routing number, account number, and if it is a checking or savings account.** (The IRS is able to deposit refunds directly into up to three taxpayers accounts.)

Yes  No – Did you rent out your home or use it for business?

Yes  No – Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)? **If yes, provide Notice CP01A from the IRS.**

Yes  No – Did you make any purchases subject to Sales and Use Tax that you did not pay Sales Tax on? If yes, what was the total amount purchased? \_\_\_\_\_

Yes  No – Did you have any Unemployment Income in 2020?

Yes  No – Were your taxes filed before the Unemployment Tax Law changed in March 2021?

Yes  No – If yes to both, did you get any additional refund? **How much?** \_\_\_\_\_

**\*\*Any information given that does not match IRS records, may delay the processing of your return and any anticipated refunds. \*\***

**Please check our website for occupation and income specific Worksheets.**

**[www.Haukeness.tax](http://www.Haukeness.tax)**

Please list any QUESTIONS about your tax preparation or COMMENTS about your included information that you would like us to know!

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_