

CSL Tax Advisors LLC
Questionnaire for 2021 Returns

Please bring this form with your drop off documents or bring to your appointment.

Please check preferred contact person & preferred method of contact.

Name _____ Spouse Name _____
Cell Number _____ Spouse Cell _____
Email _____ Spouse Email _____
IRS PIN _____ Spouse PIN _____
New Address? _____

Refunds will be delayed if these figures do not match IRS records:

- Total 3rd Stimulus Payment (max \$1400 each) \$ _____
- Total Advance payments of Child Tax Credit \$ _____

YES NO

- Any marketplace insurance? Please include Form 1095-A from HealthCare.gov (800-318-2596).
- Any IRA contributions (traditional or Roth)? Need Form 5498 from Brokerage Company.
- Any new children or dependents? Need name, birthdate, & copy of Social Security card.
- Any college students on your return? Need Form 1098-T for each from their school account.
- Any non-student dependents over age 18? Please provide their income documents.
- Did you receive, sell, send, or exchange virtual currency?
- Any foreign accounts or foreign trusts?
- Are you expecting any additional tax forms (1099, K-1, etc.)? _____

Amount of cash/credit/check charitable donations with receipts (not goods) \$ _____

Bank Name _____ Bank Routing # _____ Bank Account # _____

Use my Bank information for: Direct Deposit Refunds Pay IRS Balance Due Pay CSL prep fees

How would you like to receive your completed tax return?

Printed Paper Copy Emailed PDF Both Paper Copy and Emailed PDF

Questions/Comments/Updates: (new job, retirement plans, sold property, change in dependents, etc.)
