

Name: \_\_\_\_\_

# Independent Tax & Financial Planners, P.C.

**Holland Commons Building**  
**130 Buck Road, Suite 101**  
**Holland, PA 18966-1744**

2021 **ITFP** 2021

**Phone: (215)354-0500**  
**Fax: (215)354-0117**

Please carefully answer the following questions. These questions will help us prepare your tax return.

**You will have to send supporting documentation regarding any questions that are answered "Yes".\***

1)	Y	N	Do you have a preferred method of contact? <b>Home Phone</b> <b>Cell Phone</b> <b>Email</b>
2)	Y	N	Has your bank account information changed since last year? If so, please send a copy of a voided check.
3)	Y	N	Have you or your spouse updated your license in the past year? If so, please send a color copy of the license.
4)	Y	N	Are you or your spouse a US veteran who files a resident or non-resident NJ return?
5)	Y	N	Are you or your spouse legally blind? <b>Taxpayer</b> <b>Spouse</b>
6)	Y	N	Any life changing events that would affect your tax return? <b>Move</b> <b>Baby</b> <b>Marriage</b> <b>Divorce</b> <b>Other</b>
7)	Y	N	Did your occupation/job title change? List your new occupation/job title here: <b>Taxpayer:</b> _____ <b>Spouse:</b> _____
8)	Y	N	Did you work for any material length of time in a state other than where you reside? Which state(s)? _____
9)	Y	N	Any change to your dependents (Children/Parents)?
10)	Y	N	Do you have a child who will be preparing their own return? If yes, have you confirmed whether they will be claiming themselves or not? <b>I am claiming the child</b> <b>Child is claiming him/herself</b> <b>Unsure</b>
11)	Y	N	Did you have any children under age 19 or full-time students under age 24 at the end of 2021, with investment income in excess of \$2,200?
12)	Y	N	Did you receive any notices from the IRS, or from a state or local taxing authority?
13)	Y	N	Did you make any Federal, State or Local estimated payments? <b>Federal</b> <b>State</b> <b>Local</b>
14)	Y	N	Did you make gifts totaling more than \$15,000 to any individual during the year?
15)	Y	N	Did you or your spouse have any foreign assets or investments?
16)	Y	N	Did you start a new job or a new business? If yes, explain in comments section. <b>Job</b> <b>Business</b>
17)	Y	N	Did you have a small business for which we need to report a profit or loss?
18)	Y	N	Did you have any other sources of income? (i.e. Etsy, eBay, Uber, Airbnb, consulting, babysitting, 1099 Income etc.) If yes, please explain in Comments Section below.
19)	Y	N	Did you earn more than \$1.00 of interest on any bank accounts? If Yes, please include 1099INT(s) or please note bank(s) and amount(s) here: _____
20)	Y	N	Did you receive any Stimulus payments in 2021? If yes, amount received: _____ When? _____ <b>Please provide Form 1444-C</b>
21)	Y	N	Did you receive advanced payments of the Child Tax Credit? Total Received: _____ <b>Provide Form 6419</b>
22)	Y	N	Did you have any dividend income? If Yes, please send all 1099DIV(s).
23)	Y	N	Did you sell any stocks or mutual funds? (If yes, please provide cost basis and 1099-B)
24)	Y	N	Did you elect to defer income from a 2020 IRA/401k Distribution?
25)	Y	N	Were you granted stock options by your employer and/or exercised employer stock options? <b>Granted</b> <b>Exercised</b>
26)	Y	N	Did you have any IRA Rollovers or Transfers? <b>ITFP Only</b> <b>I had rollovers elsewhere</b>
27)	Y	N	Did you have any retirement accounts that require you to make a Required Minimum Distribution? <b>Yes, I took the RMD</b> <b>Yes, but I did not take the RMD.</b>
28)	Y	N	Do you anticipate receiving any K-1's? If so, have you received them? <b>Yes</b> <b>No</b>
29)	Y	N	Have you bought, sold, traded, spent or acquired any financial interest in any virtual currency, such as Bitcoin, during 2021? <b>Bought</b> <b>Sold</b> <b>Traded</b> <b>Spent</b>
30)	Y	N	Did you receive any unemployment compensation?
31)	Y	N	Did you have any gambling winnings or losses? <b>Winnings</b> <b>Losses</b>
32)	Y	N	Did you have any debts cancelled? If yes, were they related to your personal residence? <b>Yes</b> <b>No</b>
33)	Y	N	Any alimony? <b>Paid</b> <b>Received</b> Date of agreement? _____. Date of any amendments? _____
34)	Y	N	Did you receive any social security benefits?
35)	Y	N	Did you pay child care costs for a dependent child under age 13, or costs of caring for a disabled dependent or spouse? (Must provide EIN or SSN) <b>Child care</b> <b>Caring for disabled dependent/spouse</b>
36)	Y	N	Did you employ a full-time household worker and pay them \$2300 or more in 2021? (Such as a caregiver or housekeeper?) If so, specify: _____
37)	Y	N	Any cash or non-cash charitable contributions, or charitable mileage? <b>Cash</b> <b>Non-Cash</b> <b>Mileage</b>
38)	Y	N	Did you contribute (or plan to before April 15th) to a SEP IRA, IRA, Roth IRA for 2021? <b>Contributed</b> <b>Plan</b> If yes, were the contributions made to accounts through ITFP? <b>Yes</b> <b>No</b>
39)	Y	N	Any significant medical expenses or medical mileage? <b>Out Of Pocket Medical Expenses</b> <b>Medical Mileage</b>
40)	Y	N	Are you a grade K-12 teacher or aide? If yes, please provide any out-of-pocket classroom or professional development expenses.

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41)	<b>Y</b> <b>N</b>	Do you pay union dues? If yes, do you have documentation to support? (i.e. W-2 or paystub showing union dues) <b>Yes</b> <b>No</b>
42)	<b>Y</b> <b>N</b> <b>Y</b> <b>N</b> <b>Y</b> <b>N</b> <b>Y</b> <b>N</b> <b>Y</b> <b>N</b>	Are you self-employed? If so: Do you have documentation to support your expenses (i.e. receipts, mileage log, etc.) Did you receive any COVID-related loans or grants in 2021? (Not Stimulus Payment) Were you unable to work in 2021 due to Coronavirus Restrictions or Illness? Did you elect to defer Self-Employment Tax in 2020? Amount: _____
43)	<b>Y</b> <b>N</b>	Did you have a Health/Medical Savings Account? (HSA or MSA, NOT an FSA) If yes, any activity in 2021? <b>Contributed</b> <b>Withdrew</b> Were all withdrawals used for qualified medical expenses? <b>Yes</b> <b>No</b>
44)	<b>Y</b> <b>N</b> <b>Y</b> <b>N</b>	Did you pay any student loan interest? NJ Residents Only – Did you repay any student loan <b>principal</b> in 2021? Total Amt: _____
45)	<b>Y</b> <b>N</b> <b>Y</b> <b>N</b>	Did you have any education expenses paid in 2021 (i.e. tuition, books)? If NJ Resident – Were expenses for in-state tuition?
46)	<b>Y</b> <b>N</b>	Did you have a child/children, over the age 18, that attended college full-time for at least 5 months of 2021?
47)	<b>Y</b> <b>N</b>	Did you contribute to a 529? If yes, were these contributions made through ITFP? <b>Yes</b> <b>No</b>
48)	<b>Y</b> <b>N</b>	Any education distributions? (529, ESA, Coverdell). If yes, were these distributions done through ITFP? <b>Yes</b> <b>No</b>
49)	<b>Y</b> <b>N</b>	Did you make any purchases in which you have not paid sales tax? (Online or out-of-state purchases)
50)	<b>Y</b> <b>N</b>	Any large purchases for which you paid sales tax? (i.e. car)
51)	<b>Y</b> <b>N</b>	Did you rent your home out for any period of time, either on your own or through a company (Airbnb)?
52)	<b>Y</b> <b>N</b>	Did you make any qualified home energy improvements?
53)	<b>Y</b> <b>N</b>	Did you purchase a hybrid or electric car? Install a charging system? <b>Yes</b> <b>No</b> Date of Installation: _____
54)	<b>Y</b> <b>N</b>	Did you purchase a home in 2008 and take a federal First Time Homebuyer credit?
55)	<b>Y</b> <b>N</b>	Did you pay Real Estate Taxes or Private Mortgage Insurance (PMI)? <b>Real Estate Taxes</b> <b>PMI</b>
56)	<b>Y</b> <b>N</b>	Did you pay rent or a mortgage? <b>Rent</b> <b>Mortgage</b>
57)	<b>Y</b> <b>N</b>	Did you refinance, sell, or purchase a primary/vacation home/rental? <b>Refinance</b> <b>Sell</b> <b>Purchase</b> If yes, please send us a copy of the HUD or Settlement Sheet.
58)	<b>Y</b> <b>N</b>	Did you have a rental/vacation home? If a rental property, did you use it personally for more than 14 days? <b>Yes</b> <b>No</b>
59)	<b>Y</b> <b>N</b>	Did you take out a home equity loan? Date _____ Amount of Loan \$ _____ Was the home equity loan used entirely for home improvements? <b>Yes</b> <b>No</b>
60)	<b>Y</b> <b>N</b>	If you are a resident of NJ, RI, VT, CA, MA, MD, or DC, did you have health insurance coverage for yourself and all of your dependents for the entire year?
61)	<b>Y</b> <b>N</b>	Did you have health insurance coverage through the <b>Marketplace</b> and receive a 1095-A?
62)		How would you like to receive the tax return for your review and files? Please choose ONE of the following: <b>CD</b> <b>Thumb drive (\$5 fee)</b> <b>Paper</b> <b>ShareFile Portal</b>
63)		<b>PLEASE NOTE:</b> If you have accounts with online access, check online for tax documents. Some companies no longer mail hard copies of tax documents. <b>Acknowledged</b> <b>I have no accounts with online access</b>
<b>***PLEASE ANSWER ALL QUESTIONS***</b>		
<b>If using Google Chrome or a web browser to fill in this PDF, use the Print button and select "Save as PDF" to save your selections.</b>		
<b>If indicated above, remember to send a voided check, color copy of license, settlement sheet, etc.</b>		

COMMENTS:

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Is there anything else we can help you with, regarding taxes or financial planning?

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Check out <https://itfp.com/whats-new/> or <https://itfp.com/tax-planning/> for the latest in tax law changes.  
We encourage you to make [www.itfp.com](http://www.itfp.com) a favorite in your Web Browser.

\*We are taking extra steps to ensure that our clients' information remains secure. We encourage all of our clients to avoid sending sensitive information and documents via unsecure email.

We recommend uploading your documents to an individual ShareFile that we can create for you. If you are unable to use ShareFile, please mail your documents or drop them off in our office mailbox, located at the rear of our building.

**If you would like to send your information via ShareFile, please contact Tom O'Malia at [TomOmalia@ITFP.com](mailto:TomOmalia@ITFP.com) to set up your secure individual ShareFile.**