

2021 Client Confirmation Form



Name: _____ Spouse Name: _____
Phone: _____ Spouse Phone: _____
Email: _____ Spouse Email: _____

DEPENDENTS

- Yes No **Marital Status Change** in 2021?
- Yes No **New baby? Child moved out?** Other dependent changes in 2021?
- Yes No **Each dependent lived with you all year** (except for time away at college)?

HOME/REAL ESTATE

- Yes No **New Mailing Address** since 2020? _____
- Yes No **Buy or Sell Real Estate** in 2021?
- Yes No **Refinance a mortgage** in 2021?

JOB/INCOME

- Yes No **New job, occupation, or business startup** in 2021?
- Yes No **New sources of income?** Please describe: _____
- Yes No **Have Healthcare.gov Marketplace Health Insurance (Form 1095-A) / Obamacare?**

STIMULUS

- Yes No **I received an economic stimulus payment after Mar. 2021** → Amount Received: _____
- Yes No **I received Child Tax Credit payments after Jun. 2021** → Amount Received: _____

Please tell us **any expected changes in 2022:** _____

NOTES: _____

<h4>IF I GET A REFUND:</h4> <ul style="list-style-type: none"><input type="checkbox"/> Deposit to same account as last year<input type="checkbox"/> Deposit to this account:<ul style="list-style-type: none"><input type="radio"/> <u>Bank Name:</u> _____<input type="radio"/> <u>Account #</u> _____<input type="radio"/> <u>Routing #</u> _____<input type="radio"/> <u>Account Type:</u> <input type="checkbox"/> Checking <input type="checkbox"/> Savings<input type="checkbox"/> Mail me a check<input type="checkbox"/> Apply forward to my 2022 taxes	<h4>IF I HAVE TO PAY EXTRA TAX:</h4> <ul style="list-style-type: none"><input type="checkbox"/> Setup electronic debit from this bank account:<ul style="list-style-type: none"><input type="radio"/> <u>Bank Name:</u> _____<input type="radio"/> <u>Account #</u> _____<input type="radio"/> <u>Routing #</u> _____<input type="radio"/> <u>Account Type:</u> <input type="checkbox"/> Checking <input type="checkbox"/> Savings<input type="checkbox"/> Pay when I sign forms or <input type="checkbox"/> Pay on deadline: Mon., 4/18/22<input type="checkbox"/> I will mail a check or set up my own payment at IRS.gov/payments or MyAlabamaTaxes.alabama.gov
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I signify that I have provided (or agree to provide) a document for every type of income I had this year, and the above information is accurate to the best of my knowledge. **SIGNATURE:** _____ **DATE:** _____