

## 2021 Mandatory Questionnaire

You **must** answer all these questions before we can begin working on your return.

- 1 **Economic Impact Payment (Stimulus) #3** – In January 2022 the IRS provided all recipients of EIP #3 with a letter detailing those payments. These payments began in March 2021.

Please check the appropriate line(s) below:

I/we did not receive the EIP #3	_____
Letter from IRS is enclosed	_____
I/we received EIP #3 but don't have the letter	_____
Total Amount Received	\$_____

- 2 **Advanced Child Tax Credit Payments (ACTC)** – In January, 2022 the IRS provided all recipients of the ACTC with a letter detailing those payments. Please check applicable line below:

I/we did not receive the ACTC	_____
Letter(s) from the IRS is/are enclosed	_____
I/we received the ACTC but don't have the letter(s)	_____
Total Amount Received	\$_____

- 3 **Foreign Transactions** – provide details for any “yes” answer. “Foreign” does not include any foreign investments held in a US-based brokerage account.

	<b><u>Yes</u></b>	<b><u>No</u></b>
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Did you receive a distribution from, or were you a grantor or transferor to, a foreign trust?	_____	_____
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Did you have a financial interest in, or signature authority over, a financial account such as a bank account, securities account, or brokerage account located in a foreign country?	_____	_____
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Did you have any foreign income or pay any foreign taxes during the year from sources such as a foreign bank accounts, partnerships, or a foreign employer?	_____	_____
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Do you have any foreign financial accounts, foreign financial assets, or hold an interest in a foreign entity?	_____	_____
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	<b><u>Yes</u></b>	<b><u>No</u></b>
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- 4 **Virtual Currency** – At any time during 2021, did you receive, sell, send, exchange, or otherwise acquire or dispose of any financial interest in any virtual currency? We must answer this on your tax return. If, yes, provide details with your tax documents.

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**Be sure to complete the 2021 Client Organizer Checklist on the reverse side of this form.**