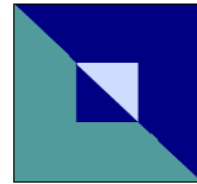


L.R. Bult & Associates, Ltd.

Certified Public Accountants
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Client Questionnaire - 2021 Tax Return

The Internal Revenue Service (IRS) matches information returns/forms with amounts reported on tax returns. Accordingly, all information returns reflecting amounts reported to the IRS are also mailed or delivered to the taxpayers in an envelope clearly marked "IMPORTANT TAX DOCUMENTS ENCLOSED" and should be submitted with this organizer.

Forms such as:

- | | | | |
|--------------------------|---|-------------------------------------|---|
| W-2 (Wages) | 1099-R (Retirement) | 1099-MISC (Rents, etc.) | Charitable Contribution Statements |
| W-2G (Gambling Winnings) | 1099-INT (Interest) | 1099-G (Unemployment) | Other Tax information statements |
| 1098 - Mortgage Interest | 1099-DIV (Dividends) | 1099 (any other) | Advance Child Tax Credit Notices 6419 |
| 1098-T (Education) | 1099-B (Brokerage Sales) | 1095 (Health Insurance) | Annual Brokerage statements (and revised) |
| Schedule K-1 | Economic Impact Payment Notices 1444-C/6475 | HUD-1 (Real Estate Sales/Purchases) | |

FILL OUT SHADED AREAS ONLY IF YOU ARE A NEW CLIENT OR ANY INFORMATION HAS CHANGED FROM PREVIOUS YEAR:					
Name	Social Security	Date of Birth	Occupation	Disabled	
Taxpayer					
Spouse					
Street Address		City	State	Zip	
**Taxpayer Drivers License or State ID # State: Date Issued: Expires:		E-mail Address:		Phone Number	
				Alt Phone Number	
**Spouse Drivers License or State ID # State: Date Issued: Expires:		Email Address:		Phone Number	
				Alt Phone Number	
Dependents Name (First, Last)	Relationship	Social Security #	Date of Birth	Disabled	

**Refunds may be delayed without ID information.

Please answer the following questions to determine your maximum deductions:

DEPENDENT INFORMATION	Please Circle
Did your marital status change during the year (by December 31, 2021)?	Yes No Not Sure
Were there any births, deaths, marriages, divorces, or adoptions in your immediate family?	Yes No Not Sure
Did you or your spouse retire or change jobs in 2021?	Yes No Not Sure
Were there any changes in dependents from the prior year?	Yes No Not Sure
<i>If yes, explain:</i> _____	
Did you have any children under the age of 19, or a full-time student under age 24 with unearned income of more than \$2,100?	Yes No Not Sure
Do you have dependents who must file a tax return?	Yes No Not Sure
Did you have any dependent care costs?	Yes No Not Sure
Did you receive Advance Child Tax Credits in 2021?	Yes No Not Sure
<i>If yes, please provide the monthly amounts and IRS notice 6419</i> _____	

HEALTH INSURANCE	Please Circle
Did you and all members of your household maintain minimum health care coverage for all months of 2021?	Yes No Not Sure
Did you or any member of your family enroll in health insurance coverage through the Health Insurance Marketplace at healthcare.gov under the Affordable Care Act? If yes, enclose Form 1095-A, Health Insurance Marketplace Statement.	Yes No Not Sure
Do you currently have a Health Savings Account?	Yes No Not Sure

INCOME INFORMATION	Please Circle
Did you receive unemployment?	Yes No Not Sure
Did you have gambling winnings or losses this past year?	Yes No Not Sure
Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly?	Yes No Not Sure
Did you receive any disability income during the year?	Yes No Not Sure
Did you receive economic impact payments in March or later of 2021 (related to COVID-19)?	Yes No Not Sure
<i>If yes, please provide the amount EIP #3 from IRS Notice 6475</i> _____	
Did you receive, sell, send, exchange, or acquire any Virtual Currency?	Yes No Not Sure
Did you receive any other income?	Yes No Not Sure

(CONTINUE ON BACK)

PURCHASES, SALES, DEBT INFORMATION	Please Circle
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Did you sell, exchange, or purchase any real estate during the year? _____ Yes No Not Sure

Did you acquire or dispose of any stock during the year? _____ Yes No Not Sure

Did you sell an existing business, rental, or other property this year? _____ Yes No Not Sure

Did you have any debts canceled or forgiven this year, such as a home mortgage, credit cards, or student loan(s)? _____ Yes No Not Sure

Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? _____ Yes No Not Sure

Did you go through bankruptcy proceedings? _____ Yes No Not Sure

ITEMIZED DEDUCTION INFORMATION	Please Circle
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Did you make any cash charitable contributions? _____ Yes No Not Sure
If yes, please provide the amount _____

Did you make any noncash charitable contributions (clothes, furniture, etc.)? _____ Yes No Not Sure

Did you make any major purchases during the year (cars, boats, etc.)? _____ Yes No Not Sure

Did you pay property tax this year? _____ Yes No Not Sure

Did you pay mortgage interest? _____ Yes No Not Sure

Did you incur expenses as a K-12 educator? _____ Yes No Not Sure

MISCELLANEOUS INFORMATION	Please Circle
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Did you give a gift of more than \$15,000 to one or more people? _____ Yes No Not Sure

Did you install any energy efficient improvements to your main residence (new construction and rentals do not apply) such as biomass stoves; generators; or fuel cells; or energy efficient improvements such as exterior windows, doors, and skylights; roofs; insulation; air source heat pumps; gas; propane or oil furnaces and fans; central air conditioners; or tankless water heaters? _____ Yes No Not Sure

Do you have a foreign bank account, trust, or business? _____ Yes No Not Sure

Did you have a financial interest in foreign financial assets? _____ Yes No Not Sure

Do you owe back child support or any other debts that could affect your return? _____ Yes No Not Sure

Do you have any unpaid sales/use tax for tax year 2021 (such as from goods you purchased online or from a catalog)? _____ Yes No Not Sure

Did you make any Federal and/or State estimated tax payments for the 2021 tax year? _____ Yes No Not Sure
If yes, please provide the payment dates & amounts _____

Have you set up an online account at IRS.gov? _____ Yes No Not Sure

EDUCATION INFORMATION	Please Circle
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Did you have any educational expenses during the year on behalf of yourself, spouse, or a dependent(s)? _____ Yes No Not Sure

Did you pay interest on a student loan for yourself, your spouse, or your dependent(s) during the year? _____ Yes No Not Sure

Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year? _____ Yes No Not Sure

Did you cash any U.S Savings Bonds Series EE and/or I ? _____ Yes No Not Sure

DIRECT DEPOSIT OR REFUND	Please Circle
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Would you like to have your refund(s) directly deposited into your account? _____ Yes No Not Sure

FILL OUT ONLY IF YOU ARE A NEW CLIENT OR ANY INFORMATION HAS CHANGED FROM PREVIOUS YEAR:
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ACCOUNT:

Name of Financial Institution- _____

Name on Account- _____

Financial Institution Routing Transit Number- _____

Your Account Number- _____

Type of Account- Checking Traditional Savings Other *Please Specify* _____

We will prepare your 2021 Federal and State income tax returns using information you provide to us. We may ask for clarification of some items, but will not audit or otherwise verify the data to discover errors or omissions, should any exist. We will perform accounting services only as needed to prepare your tax returns and will not verify or audit your records. In instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select. The following Questionnaire will help organize important information in order to facilitate an efficient preparation of your return.

To the best of my knowledge the information enclosed in this client tax organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's tax returns for which I have adequate records.

Taxpayer

Date

Spouse

Date