

Print Name(s): _____ Date: _____

**These questions pertain to calendar year 2021, unless otherwise noted.
If married filing jointly, the questions apply to you and your spouse.**

Yes No

1. Did you receive the third stimulus? If yes, please provide dollar amount. \$ _____
This was generally received between mid-March through May 2021. The dollar amount can be found on Notice 1444-C.

2. Did you receive any advanced child tax credit payments? If so, list the monthly amounts. July \$ _____
August \$ _____ Sept. \$ _____ Oct. \$ _____ Nov. \$ _____ Dec. \$ _____

3. Did you, your spouse, or dependents have health insurance through the Health Insurance Marketplace?
You can purchase health insurance through the Marketplace or even through a broker.
If yes, you must provide 2021 Form 1095-A Health Insurance Marketplace Statement.

4. Did you buy, sell, or exchange virtual currency in 2021? (such as Bitcoin, Litecoin, Ripple, Ethereum, etc.)
If yes, you must provide a record of all your cryptocurrency transactions, including how much you paid for crypto, how long you held it for and how much you sold it for, as well as receipts for each transaction.

5. Did you incur any dependent childcare expenses in 2021? If yes, please provide childcare expense statements.

6. Did you pay tuition costs for yourself or a family member in 2021 (even if classes were attended in another year)?
If yes, you must provide 1098-T and related financial transcripts.

7. Did you trade goods, services, etc. in exchange for other goods, services, etc., rather than for money? i.e. Barter

8. Did you receive any payments or material from anyone for providing services?

9. Did you pay or receive alimony?
Circle one: Pay or Receive Amount \$ _____

10. Do you own any securities (stocks, bonds) or hold any debts that became worthless during 2021?

11. Did you have any debts canceled or reduced (credit cards, car loans, mortgage debt, etc.), property repossessed or foreclosed upon, or did you file bankruptcy in 2021? You may need to provide Form 1099-C.
If yes, please explain _____

12. Did you (or do you plan to before April 15, 2022) contribute to a traditional IRA or Roth IRA for 2021?

13. Did you start/have a business or purchase any rental property during 2021?

14. Did you pay any individual \$2,300 or more to preform household services during 2021, such as a babysitter, caretaker, housekeeper, cook, gardener, etc. ?

15. Did you receive any income in 2021 not shown on this organizer? If so, list income: