

# Blizzard Business Service, Inc

## 2021 Tax Preparation Questionnaire

Name \_\_\_\_\_ Spouse \_\_\_\_\_  
Occupation: Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_  
Address \_\_\_\_\_  
Phone (Cell) \_\_\_\_\_ Landline \_\_\_\_\_ E-mail \_\_\_\_\_  
Can I contact you by text or e-mail (no personal or tax information will be used) Yes \_\_\_ No \_\_\_  
Direct Deposit (attached voided check only if you changed from last year) \_\_\_ Paper check \_\_\_  
Are you married \_\_\_\_, divorced \_\_\_\_, widowed \_\_\_\_ Date of 2021 spouse death \_\_\_\_\_  
Dependents you may claim for 2021 \_\_\_\_\_  
New child? \_\_\_ Name \_\_\_\_\_ Date of birth \_\_\_\_\_ Child's Social Security # \_\_\_\_\_  
Did you have a Stillborn in 2021 Yes \_\_\_ No \_\_\_  
Is any dependent a full-time student (to age 24) Yes \_\_\_ No \_\_\_ Name \_\_\_\_\_  
If you have been a victim of identity theft attach letter showing IRS IP Pin.  
Is anyone (taxpayer, spouse, dependent) totally and permanently disabled \_\_\_\_\_ or blind \_\_\_\_\_  
If you are able, copy the taxpayer and spouse (if married) driver's license OR provide date of issue and expiration. Taxpayer Issue \_\_\_\_\_ Expiration \_\_\_\_\_  
Spouse Issue \_\_\_\_\_ Expiration \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 1) At any time during 2021 did you have a financial interest in or signature authority over a financial account or trust located in a foreign country?

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 2) Did you receive, send, sell or exchange or otherwise acquire any interest in any virtual currency (ie: bitcoin)?

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 3) Did you make purchases that you did not pay Michigan Sales Tax on?

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 4) Did you give more than \$14,000 to any one individual during 2021?

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 5) Did you receive a Stimulus Payment in 2021? Attach IRS Notice 1444 or give amount if known and you are unable to find the letter \_\_\_\_\_. Did not receive \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 5) Did you receive a Advance Child Tax Payment in 2021? Attach IRS Notice 6419 or give amount if known and you are unable to find the letter \_\_\_\_\_.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 6) Did you make charitable contributions of at least \$600 during 2021? Go Fund Me and certain Foundations do not apply. Must be IRS non-profit approved.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 7) Attach W-2 forms

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 8) If you worked from home this year, indicate the number of days you worked from home versus total days worked if your job is normally in a city that collects income tax.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 9) Education expense. Attach Form 1098-T and other allowable expenses.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 10) Interest/Dividend income. Attach Forms 1099-INT, 1099-DIV, etc.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 11) Information on sale of stocks or real estate (Form 1099-B or 1099-S)

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 12) Unemployment benefits. Attach Form 1099-G

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 13) Pension distributions. Attach Form 1099-R.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 13a) Did you take an early distribution due to COVID-19?

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 14) Social Security benefits. Attach Form SA-1099

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 15) Information for self-employed business

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 16) Information on rental property

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 17) Other income (gambling, lottery, jury duty, etc)

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 18) Did you make a non-payroll deducted contribution to a retirement account for 2021? [ ] IRA [ ] Roth IRA [ ] 401k [ ] Other Amount \$ \_\_\_\_\_ for \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 19) Do you have an HSA or FSA? Attach form 5498-SA, 1099-SA and 12-31 bank statement for account if available.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 19a) Did you have a high deductible plan for family \_\_\_ self only \_\_\_ for 12 months or how many months if not a full year \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 20) Did you have any debt from a mortgage, loan or credit card cancelled or forgiven by the lender. Attach Form 1099-C or 1099-A.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 21) Have you had an Earned Income Credit disallowed in a previous year?

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 22) Did you pay any student loan interest. Attach Form 1098-E.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 23) Did you buy or sell a home in 2021? Will need the closing statement that shows the sales price and all deductions allocated at the time of sale.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 24) For child care expense provide caregiver, address, SS or EIN and amount paid. Also indicate for which child/children.

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 25) Did you pay estimated payments? List amounts and dates (include January 2022 payment)

IRS \_\_\_\_\_  
MI \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ 26) Health insurance. Attached 1095-A, 1095-B or 1095-C. Amount you paid for health insurance \$ \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Unsure \_\_\_ **27)** Attach copy of 2021 winter and summer property taxes (even if not paid)

Additional information:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Please attach another sheet of paper if you have more information to add to these questions.**

**X** \_\_\_\_\_  
Taxpayer Signature

**X** \_\_\_\_\_  
Spouse Signature (if married)

Dated \_\_\_\_\_  
Revised 01.01.2022