



Taxpayer: \_\_\_\_\_ Spouse: \_\_\_\_\_

**TAX INTERVIEW GUIDE**

Please answer questions for the **current tax year 2021** unless otherwise requested.

**Purpose:** To ensure we've asked all appropriate questions as required by the IRS and your state tax agency and to help us get the best results for your tax return.

Check **Y** or **N** for all questions. For all "yes" answers see the "**Documents needed**" column to see what information we will need to properly complete your return.

**Personal Information**

Marital status on 12/31/2021 <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Widowed (not remarried) <input type="checkbox"/> Divorced <input type="checkbox"/> Separated			
Did your marital status change due to death in 2021?			Death Certificate
Did IRS send you/spouse an Identity Protection Pin Number (IP Pin)?			IP Pin Letter
Would you like information on how to obtain an Identity Protection Pin Number on your own?			
Are either you/spouse legally blind?			Physician Statement(s)
Were you a citizen or resident of another country in 2021?			
Did you change addresses in 2021?			
Were you a full year California resident in 2021?			
If you are entitled to a refund, do you want to have it direct deposited into your account?			Account Info; Voided Check

County of Residence: **(Circle One)**  
**Riverside San Diego San Bernardino Los Angeles Orange Other**\_\_\_\_\_

**Covid-19 Relief**

Did you receive Stimulus payment #3 (\$1400 per qualifying individual)? Provide amounts received.			Letter 6475
Did you receive Advance Child Tax Credit payments?			Letter 6419
<b>Payment Date</b>	<b>Amount</b>	<b>Payment Date</b>	<b>Amount</b>
July 15, 2021		September 15, 2021	
August 13, 2021		October 15, 2021	
		November 15, 2021	
		December 15, 2021	

**Lifestyle**

Did you pay or receive any alimony payments in 2021? Paid Received \$_____	Recipient's SSN	Date of divorce/separation/recent modification:		Divorce Decree & Payment records
Do you own or have financial interest in a foreign bank or financial account?				Statements or ?
Are you involved in bankruptcy, foreclosure, or repossession?				Legal records
Have you had any debt cancellation (including credit cards) in 2021?				Form 1099-C or 1099-A
Did you make gifts of more than \$15,000 to one or more individuals during the year?				

**Children, Dependents, Education**

Were any children born or adopted into your household in 2021?			Birth cert, SS Card, Adoption Expenses.
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Check <b>Y</b> or <b>N</b> for <u>all</u> questions. For all "yes" answers see the " <b>Documents needed</b> " column to see what information we will need to properly complete your return.	<b>Y</b>	<b>N</b>	<b>Documents needed</b>
Are you claiming a child that you are not the custodial parent of?			Form 8332
Did you pay for child care while you worked or looked for work?			Payment records
Do you have any children who have unearned income of \$1,100 or more in 2021			Tax Forms
Did you pay any tuition for a dependent or take classes yourself?			Form 1098-T
<b>Income</b>			
Did you receive unemployment income (Regular or Pandemic Unemployment assistance) in 2021?			Form 1099-G
Did you have gambling winnings; Casino/Lottery/Other in 2021?			Form W2-G; W/L Stmt / Logs
Do you have income from any hobbies?			Income records
Did you receive any payments from an installment sale?			Contract/Records
Did you receive income for serving on a jury in 2021?			Form 1099-MISC
Have you included all sources of income with your records?			
Are you answering these questions truthfully and to the best of your knowledge?			
<b>Cryptocurrency</b>			
Do you own any virtual cryptocurrency? (e.g., Bitcoin, Dogecoin, etc.)?			Account Statements
Did you receive any tax forms from your virtual cryptocurrency exchange?			Tax Forms
Did you move <b>ANY</b> of your cryptocurrency from one wallet to another			Account Statements
<b>Investments</b>			
Did you, or do you plan to, contribute any money to an IRA for 2021? Traditional IRA or Roth IRA			
Did you roll over any amounts from a retirement account in 2021?			Form 1099-R
Did you sell or transfer any stocks, bonds, mutual funds, or other investments?			1099-B; Brokerage Statements
Did you liquidate any worthless investments in 2021?			Records
Were you a victim of Investment theft in 2021?			Records
Did you buy or sell rental or investment property?			Final closing statement
<b>Business</b>			
Do you own a business or have interest in a partnership, corporation, LLC, farming activities, or other?			
Did you receive income from a sharing/gig economy activity (e.g., Airbnb, Door dash, Uber, etc.)?			Form 1099-K? other?
Did you sell any items that were used in business or rental transactions?			Sales Records
Did you use your own personal vehicle for business purposes?			Mileage Log
<b>Medical</b>			
Did you have medical insurance for yourself all year?			1095-B, 1095-C, other proof
Did your spouse have medical insurance all year?			1095-B, 1095-C, other proof
Did you purchase health coverage through the state program "Covered California" or other public exchange?			Form 1095-A
Did your spouse purchase health coverage through the state program "Covered California" or other public exchange?			Form 1095-A
Did you, or do you plan to, contribute any money to an HSA for 2021?			

Check **Y** or **N** for all questions. For all "yes" answers see the "Documents needed" column to see what information we will need to properly complete your return.

	Y	N	Documents needed
<b>Home</b>			
Did you purchase or sell a main home in during the year?			Final Closing Statement
If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased?			2008+2009 Tax Return
Did you refinance your original purchase mortgage or take a home equity loan?			Final Closing statement
Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			Breakdown of other expenses
Did you make any new energy efficient improvements to your home?			Contract/Certification
Do you own your home?			Property Tax Payments
Did you pay interest on mortgage payments for your home?			Form 1098
Do you rent your home?			
Did you pay any interest on a loan for a boat or RV that has living quarters?			EIN & Address of Lender

<b>Taxes and Deductions</b>			
Did you make any untaxed out of state purchases in 2021? (eBay, other...)			Total Amount
Did you pay sales taxes on a major purchase in 2021 such as a vehicle, boat, or home?			Contract
Did you donate money to a charity in 2021?			Receipts
Did you donate any goods to a charity			Documentation of value
Did you have any educator expenses?			Total Amount

<b>Estimated Payments</b>						
Did you make quarterly estimated tax payments to IRS?						
<i>Payment Date</i>	<i>Amount</i>	<i>Payment Method</i>	<i>Payment Date</i>	<i>Amount</i>	<i>Payment Method</i>	
Did you make quarterly estimated tax payments to State?						
<i>Payment Date</i>	<i>Amount</i>	<i>Payment Method</i>	<i>Payment Date</i>	<i>Amount</i>	<i>Payment Method</i>	

By my signature(s) below I acknowledge that I have documentation to support all income and expenses used on my tax return(s). In the event of an audit where such documentation cannot be provided in my defense, I/we hold **Tucker's Tax Service** harmless for any adverse consequences that may be imposed by the Internal Revenue Service, the Franchise Tax Board or other taxing agencies.

\_\_\_\_\_  
Taxpayer Signature \_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature \_\_\_\_\_  
Date

***It is the legal obligation of taxpayers to report all income received and to claim legitimate and documented deductions and credits. By our signatures above we acknowledge that we have provided information necessary to fulfill our legal obligations. The following statement appears on your tax forms in the signature space: "Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. "***