

**DAVID C. BRYANT, CPA - INDIVIDUAL INTERVIEW  
2021 INCOME TAX RETURN**

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

Yes	No	Question / Response
_____	_____	Did you receive a 6-digit PIN # from the IRS (identity theft)? <b><i>If YES, please provide:</i></b> _____
_____	_____	Did you receive a 3 <sup>rd</sup> Economic Impact Payment (Letter 6475) and/or a Plus-up payment? ( <i>Maximum payment of \$1,400 per person for 3<sup>rd</sup> EIP. Plus-up payments were additional payments to people who received a 3<sup>rd</sup> EIP based on a 2019 tax return and then qualified for a larger amount based on their 2020 tax return.</i> ) <b><i>If YES, how much for 3<sup>rd</sup> EIP?</i></b> _____ <b><i>If YES, how much for Plus-up?</i></b> _____
_____	_____	Did you receive any Advance Child Tax Credit payments? <b><i>If YES, please provide Letter 6419.</i></b>
_____	_____	Did you receive a Maryland Economic Impact payment? <b><i>If YES, how much?</i></b> _____
_____	_____	Did you receive any Unemployment Benefits in 2021? <b><i>If YES, please provide 1099-G.</i></b>
_____	_____	Did you make a charitable donation of \$300 or more? <b><i>If YES, please provide documentation.</i></b>
_____	_____	Did you purchase insurance through the Health Insurance Marketplace at any time in 2021? <b><i>If YES, please provide 1095-A.</i></b>
_____	_____	Did you make any estimated tax payments? <b><i>If YES, we will need dates, amounts, &amp; to whom.</i></b>
_____	_____	Was there a change in your dependents? ( <i>Additional child/parent on return, taking child off, etc.</i> )
_____	_____	Do you have a child, age 17-23, whom is a student and had lived with you for over half the year (whether away at college or not) <b>OR</b> a non-child relative that you supported?
_____	_____	Did you pay childcare costs for a dependent child under age 13 so you could work?
_____	_____	Did you or your child go to college full time (6 credits) for at least one semester? <b><i>If YES, what year of college?</i></b> <u>Circle</u> <b><i>Freshman, Sophomore, Junior, Senior</i></b>
_____	_____	Were distributions from a 529 plan used to pay for your child's tuition for Grades K-12? <b><i>If YES, please provide the student's name and amount paid in tuition, room, and board.</i></b>
_____	_____	Did you pay or receive alimony?
_____	_____	Did you purchase/sell/refinance a house? <b><i>If YES, we will need the Closing Disclosure statement.</i></b>
_____	_____	If you have a home equity loan or line of credit, was it used to <b>buy</b> or <b>improve</b> a 1 <sup>st</sup> or 2 <sup>nd</sup> residence? <b><i>If NO, what was it used for (consolidate debt, buy boat or car, etc.)?</i></b>
_____	_____	Have you had any debts cancelled or reduced? <b><i>If YES, we will need a 1099-C.</i></b>
_____	_____	➤ Was it part of a bankruptcy? <b><i>If YES, we will need the bankruptcy documents.</i></b>
_____	_____	Did you contribute to an IRA, <i>other than through your employer</i> ? <b><i>If YES, Circle Traditional or Roth</i></b>
_____	_____	Did you take a distribution from an IRA, 401K, or 403B? <b><i>If YES, Circle which one. How many accounts?</i></b>
_____	_____	➤ Was any part of this distribution paid <i>directly</i> to a charity?
_____	_____	Did you buy or sell stock?
_____	_____	Did you buy or sell company stock in 2021 from an employer that you work or worked for?
_____	_____	Did you contribute to/receive distributions from your Health Savings Account? <b><i>NOT flex spending.</i></b>
_____	_____	Do you pay for long term health care? <b><i>Not health insurance; only long-term care.</i></b>
_____	_____	Are you an active member of the Armed Forces or Reservist?
_____	_____	Did you receive a military pension?
_____	_____	Do you have a financial interest in or signature authority over any foreign financial accounts?
_____	_____	Did you buy, sell, receive, or send cryptocurrency in 2021? <b><i>If YES, please provide us with more information regarding the transactions.</i></b>
_____	_____	Do you own a rental property? <b><i>If YES, how many hours worked at each property?</i></b> _____
_____	_____	Did you gift anyone \$15,000 or more in dollars or property? <b><i>If YES, a gift tax return is needed.</i></b>
_____	_____	If you receive a refund, would you like it to be direct deposited?
_____	_____	If you owe money, would you like it to be directly withdrawn?
_____	_____	➤ <b><i>IF YES TO EITHER QUESTION ABOVE: please provide a voided check or write your bank name, routing, and full account number here:</i></b> _____
_____	_____	➤ <b><i>If the requested bank information above is NOT provided and you receive a refund, it will be sent to you as a check via mail.</i></b>

Please mark the box if there are additional items/notes we may need to be aware of and add them to the back.

*By signing below, you verify that all data given to David C. Bryant, CPA may be used in preparation of your 2021 individual income tax returns.*

Signature of Interviewee \_\_\_\_\_ Date of Interview \_\_\_\_\_