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## **2021 TAX ORGANIZER**

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**This tax organizer has been prepared for your use in gathering the information needed for your 2021 tax return.**

**To save you time, selected information from your 2020 tax return has been entered in this organizer. Please line through any information that does not apply to your 2021 tax return.**

**In some cases, 2020 amounts have been included in a separate column. These amounts are for comparison purposes only. You do not need to change these prior year amounts.**

**If we may be of further assistance, please contact us at your convenience.**

**REMOVE THIS SHEET PRIOR TO RETURNING THE COMPLETED ORGANIZER**

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## **2021 TAX ORGANIZER**

**T  
O**

**I (We) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct and complete to the best of my (our) knowledge.**

<b>Taxpayer Signature</b>	<b>Date</b>
<b>Spouse Signature</b>	<b>Date</b>

**Mail Sheet: Send to Taxpayer**

**REMOVE THIS SHEET PRIOR TO RETURNING THE COMPLETED ORGANIZER**



This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2021 federal and requested state income tax returns from information that you will furnish us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

## PRIVACY POLICY

CPAs, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

### TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization.

### PARTIES TO WHOM WE DISCLOSE INFORMATION

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees and, in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

### PROTECTING THE CONFIDENTIALITY AND SECURITY OF CURRENT AND FORMER CLIENTS' INFORMATION

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

\*\*\*\*\*

Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

# Topic Index

1

	<u>Form</u>		<u>Form</u>
Alimony Paid or Received .....	13	Gambling Winnings .....	21
Annuity Payments Received .....	9A	Gifts .....	34, 35
Application of Refund .....	20	Health Savings Accounts .....	13A
Business Income and Expenses .....	6, 6A	Household Employment Taxes .....	19
Business Use of Home:		Installment Sale Receipts .....	7
Business .....	6D	Interest Income .....	5A
Employee Business Expenses .....	17B	Interest Paid .....	14A
Farm .....	12E	Investment Interest Expense .....	14A
Itemized Deductions .....	16A	IRA Contributions .....	9
Passthrough .....	11B	IRA Distributions .....	9
Rental .....	10E	Keogh Plan Contributions .....	9A
Calendar .....	33	Medical and Dental Expenses .....	14
Casualty or Theft Losses .....	16	Ministerial Income .....	13B
Child and Dependent Care Expenses .....	18	Miscellaneous Income and Adjustments .....	13
Consolidated Brokerage Statements:		Miscellaneous Itemized Deductions .....	16
Interest Income & Foreign Information .....	5E	Mortgage Interest Paid .....	14A
Dividend Income & Foreign Information .....	5F	Moving Expenses .....	8
Sales of Stocks, Securities, Capital Assets & Misc. Income .....	5G	Partnership Income .....	11
Contributions .....	15	Pension Income .....	9A
Dependent Information .....	3A	Personal Information .....	3
Depreciable Property and Equipment:		Railroad Retirement Benefits .....	13
Business .....	6A	Real Estate Mortgage Investment Conduit Income (REMIC) .....	11
Employee Business Expenses .....	17A	Rental and Royalty Income and Expenses .....	10, 10A
Farm .....	12B	Roth IRA Contributions/Conversions .....	9
Rental and Royalty .....	10B	S Corporation Income .....	11
Direct Deposit Information .....	4A	Sale of Stock, Securities and Other Capital Assets .....	7
Dividend Income .....	5B	Sale of Your Home .....	8
Education Expenses .....	18	Savings Bond Purchases .....	4B
Educator (Teacher) Expenses .....	13A	SEP/SIMPLE Plan Contributions .....	9A
Electronic Filing .....	4	Social Security Benefits .....	13
Employee Business Expenses .....	17, 17A	State and Local Tax Refunds .....	13
Estate Income .....	11	Student Loan Interest .....	13A
Farm Income and Expenses .....	12, 12A, 12B	Taxes Paid .....	14
Federal, State and City Estimated Taxes .....	20, 20A	Trust Income .....	11
Foreign Assets .....	5C, 5D	Unemployment Compensation .....	13
Foreign Employment Information .....	30, 30A, 30B	Vehicle/Other Listed Property Information:	
Foreign Housing Expenses .....	30C	Business .....	6B, 6C
Foreign Taxes .....	32	Employee Business Expenses .....	17A
Foreign Travel and Workdays .....	30D	Farm .....	12C, 12D
Foreign Wages and Other Income .....	31, 31A, 31B	Rental and Royalty .....	10C, 10D
		Partnership/S Corporation .....	11A
		Wages and Salaries .....	3A



# Personal Information

### Taxpayer:

First Name and Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Occupation \_\_\_\_\_ Date of Birth (Mo/Da/Yr) \_\_\_\_\_ Date of Death (Mo/Da/Yr) \_\_\_\_\_

Driver's License or State-Issued ID Number \_\_\_\_\_ Expiration Date (Mo/Da/Yr) \_\_\_\_\_ Issue Date (Mo/Da/Yr) \_\_\_\_\_ State \_\_\_\_\_  Does not expire

Driver's License  State-Issued ID  No Identification

### Spouse:

First Name and Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Occupation \_\_\_\_\_ Date of Birth (Mo/Da/Yr) \_\_\_\_\_ Date of Death (Mo/Da/Yr) \_\_\_\_\_

Driver's License or State-Issued ID Number \_\_\_\_\_ Expiration Date (Mo/Da/Yr) \_\_\_\_\_ Issue Date (Mo/Da/Yr) \_\_\_\_\_ State \_\_\_\_\_  Does not expire

Driver's License  State-Issued ID  No Identification

### Contact Information:

Street Address \_\_\_\_\_ Apartment Number \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP or Postal Code \_\_\_\_\_

Foreign Province or County \_\_\_\_\_

Foreign Country \_\_\_\_\_

Taxpayer Daytime/Work Phone \_\_\_\_\_ Taxpayer Evening/Home Phone \_\_\_\_\_ Taxpayer Foreign Phone \_\_\_\_\_

Taxpayer Cell Phone \_\_\_\_\_ Taxpayer Fax Number \_\_\_\_\_

Spouse Daytime/Work Phone \_\_\_\_\_ Spouse Evening/Home Phone \_\_\_\_\_ Spouse Foreign Phone \_\_\_\_\_

Spouse Cell Phone \_\_\_\_\_ Spouse Fax Number \_\_\_\_\_

Taxpayer Email Address \_\_\_\_\_

Spouse Email Address \_\_\_\_\_

Preferred Method of Contact \_\_\_\_\_

May the IRS or other taxing authority discuss the return with the preparer?  Yes  No

Is the taxpayer claimed as a dependent on someone else's tax return?  Yes  No

Are you considered legally blind per IRS regulations?  Yes  No

Do you want to contribute to the Presidential Election Campaign Fund?  Yes  No

Are you a U.S. citizen or Green Card holder?  Yes  No

**Personal Identification Numbers:**  Code - 1 - Issued by IRS 2 - Issued by State or City

The IRS has recommended that taxpayers have an Identity Protection (IP) PIN to increase filing security. If you would like an IP PIN for yourself, your spouse, or your dependents or have one but do not know the IP PIN assigned, visit [IRS.gov](http://IRS.gov) to retrieve it or apply.

TS	State	City	Code	PIN

### Tax Organizer Legend:

**Throughout the tax organizer, you will find columns with the heading "TSJ". Enter "T" for taxpayer, "S" for spouse or "J" for joint.**





# Personal Information

### Taxpayer:

First Name and Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Occupation \_\_\_\_\_ Date of Birth (Mo/Da/Yr) \_\_\_\_\_ Date of Death (Mo/Da/Yr) \_\_\_\_\_

Driver's License or State-Issued ID Number \_\_\_\_\_ Expiration Date (Mo/Da/Yr) \_\_\_\_\_ Issue Date (Mo/Da/Yr) \_\_\_\_\_ State \_\_\_\_\_  Does not expire

Driver's License  State-Issued ID  No Identification  Choose not to provide

### Spouse:

First Name and Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Occupation \_\_\_\_\_ Date of Birth (Mo/Da/Yr) \_\_\_\_\_ Date of Death (Mo/Da/Yr) \_\_\_\_\_

Driver's License or State-Issued ID Number \_\_\_\_\_ Expiration Date (Mo/Da/Yr) \_\_\_\_\_ Issue Date (Mo/Da/Yr) \_\_\_\_\_ State \_\_\_\_\_  Does not expire

Driver's License  State-Issued ID  No Identification  Choose not to provide

### Contact Information:

Street Address \_\_\_\_\_ Apartment Number \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP or Postal Code \_\_\_\_\_

Foreign Province or County \_\_\_\_\_

Foreign Country \_\_\_\_\_

Taxpayer Daytime/Work Phone \_\_\_\_\_ Taxpayer Evening/Home Phone \_\_\_\_\_ Taxpayer Foreign Phone \_\_\_\_\_

Taxpayer Cell Phone \_\_\_\_\_ Taxpayer Fax Number \_\_\_\_\_

Spouse Daytime/Work Phone \_\_\_\_\_ Spouse Evening/Home Phone \_\_\_\_\_ Spouse Foreign Phone \_\_\_\_\_

Spouse Cell Phone \_\_\_\_\_ Spouse Fax Number \_\_\_\_\_

Taxpayer Email Address \_\_\_\_\_

Spouse Email Address \_\_\_\_\_

Preferred Method of Contact \_\_\_\_\_

May the IRS or other taxing authority discuss the return with the preparer?  Yes  No

Is the taxpayer claimed as a dependent on someone else's tax return?  Yes  No

Are you considered legally blind per IRS regulations?  Yes  No

Do you want to contribute to the Presidential Election Campaign Fund?  Yes  No

Are you a U.S. citizen or Green Card holder?  Yes  No

**Personal Identification Numbers:**  Code - 1 - Issued by IRS 2 - Issued by State or City

The IRS has recommended that taxpayers have an Identity Protection (IP) PIN to increase filing security. If you would like an IP PIN for yourself, your spouse, or your dependents or have one but do not know the IP PIN assigned, visit [IRS.gov](http://IRS.gov) to retrieve it or apply.

TS	State	City	Code	PIN

### Tax Organizer Legend:

**Throughout the tax organizer, you will find columns with the heading "TSJ". Enter "T" for taxpayer, "S" for spouse or "J" for joint.**



2021

# Dependents and Wages

3A

## Dependent Information:

	First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	Relationship to Taxpayer
A						
B						
C						
D						
E						
F						
G						
H						

Did dependent have income over \$4,300?



	Months Lived in Your Home	X if Disabled	Yes or No	Identity Protection PIN
A				
B				
C				
D				
E				
F				
G				
H				

Provide the name of any dependent who is not a U.S. citizen or Green Card holder.

Provide the name of any person living with you who is claimed as a dependent on someone else's tax return.

List the years that a release of claim to exemption is given for a dependent child not living with you.

## Wages and Salaries: Include all copies of your current year Forms W-2

Note: Use this section to report any wages and/or salaries for which no Form W-2 was received.

TS	Employer's Name	Taxable Wages	Tax Withheld				
			Federal	FICA/TIER 1	Medicare	State	Local



2021

# Dependents

3A

### Dependent Information:

	First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	Relationship to Taxpayer
A						
B						
C						
D						
E						
F						
G						
H						

Did dependent have income over \$4,300?



	Months Lived in Your Home	X if Disabled	Yes or No	Identity Protection PIN
A				
B				
C				
D				
E				
F				
G				
H				

Provide the name of any dependent who is not a U.S. citizen or Green Card holder.

---

Provide the name of any person living with you who is claimed as a dependent on someone else's tax return.

---

List the years that a release of claim to exemption is given for a dependent child not living with you.

---



2021

# Electronic Filing

## Electronic Filing:

Electronic filing is the means by which your return is transmitted directly to the IRS and state tax authorities. The IRS has implemented an electronic filing mandate requiring certain preparers, including this firm, to file all returns that they prepare electronically. Some states also require certain preparers to electronically file state returns prepared. The IRS and some states allow taxpayers to elect not to file their returns electronically.

Do not electronically file the federal return .....

Do not electronically file the state return(s) .....

**Note: The IRS and some states that require returns to be electronically filed also impose fees and/or penalties for failure to do so. If you checked either of the boxes above, you may be required to sign an "opt-out" form before we can release your returns. As a follow-up we will contact you to discuss these requirements and your ability to "opt-out" of electronic filing.**

The IRS requires, and many states allow, the use of a Personal Identification Number (PIN) in lieu of mailing a signature document when electronically filing.

Would you like to use a randomly generated PIN?	<input type="checkbox"/>	<input type="checkbox"/>
Taxpayer .....	<input type="checkbox"/>	<input type="checkbox"/>
Spouse .....	<input type="checkbox"/>	<input type="checkbox"/>

If No, enter a 5-digit self-selected PIN:

Taxpayer PIN ..... \_\_\_\_\_

Spouse PIN ..... \_\_\_\_\_



2021

# Electronic Filing

## Electronic Filing:

Electronic filing is the means by which your return is transmitted directly to the IRS and state tax authorities. Electronic filing is the only filing method that provides you with acknowledgment that the IRS has received your return and is processing it. If you are to receive a refund and use direct deposit with electronic filing, you will normally receive your refund in about 3 weeks.

Note that not all returns qualify for electronic filing under IRS rules.

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If you qualify for electronic filing, would you like to file the return electronically with the IRS? .....

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

If you qualify, would you like to file your state returns electronically? .....

## The IRS requires the use of a 5-digit self-selected Personal Identification Number (PIN) in lieu of mailing a signature document when electronically filing.

Would you like to use a randomly generated PIN?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

Taxpayer .....

Spouse .....

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

If No, provide a 5-digit self-selected PIN:

Taxpayer PIN ..... \_\_\_\_\_

Spouse PIN ..... \_\_\_\_\_



2021

# Electronic Filing

## Electronic Filing:

Electronic filing is the means by which your return is transmitted directly to the IRS and state tax authorities. The IRS has implemented an electronic filing mandate requiring certain preparers, including this firm, to file all returns that they prepare electronically. Some states also require certain preparers to electronically file state returns prepared. The IRS and some states allow taxpayers to elect not to file their returns electronically. If you prefer not to electronically file your return, please refer to and sign the opt-out statement below. Because some states have official opt-out forms, additional signatures may be necessary before your return can be filed.

## Opt-Out Statement:

\_\_\_\_\_ has informed me (us) that my (our) 2021 Individual Income Tax return may be required to be electronically filed if the firm files the return on my (our) behalf. I (We) understand that electronic filing may provide a number of benefits to taxpayers, including an acknowledgment that the IRS received the return, a reduced chance of errors in processing, and faster refunds. I (we) do not want to file my (our) return electronically and will personally file the paper return. My (our) preparer will not file or otherwise mail or submit my (our) paper return to the IRS.

Taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse signature: \_\_\_\_\_ Date: \_\_\_\_\_

**The IRS requires the use of a 5-digit self-selected Personal Identification Number (PIN) in lieu of mailing a signature document when electronically filing.**

Would you like to use a randomly generated PIN?		<b>Yes</b>	<b>No</b>
Taxpayer .....		<input type="checkbox"/>	<input type="checkbox"/>
Spouse .....		<input type="checkbox"/>	<input type="checkbox"/>

If No, enter a 5-digit self-selected PIN:

Taxpayer PIN ..... \_\_\_\_\_

Spouse PIN ..... \_\_\_\_\_



# Direct Deposit and Withdrawal

## Direct Deposit and Electronic Funds Withdrawal Account Information:

The IRS and certain states allow refunds to be deposited to and balances due to be paid directly from your financial institution. If you would like to receive your refund or pay a balance due electronically, complete the following information. Additional space has been provided for the use of multiple accounts. If you selected direct deposit or electronic withdrawal in 2020, your account information is already included below.

Would you like any refunds owed to you directly deposited? .....	<b>Yes</b> <b>No</b>
Would you like to pay any amount due on your <u>federal</u> return using electronic withdrawal? .....	<input type="checkbox"/> <input type="checkbox"/>

If Yes, what amount would you like withdrawn, if not the entire balance due? \_\_\_\_\_

If Yes, when should the withdrawal occur, if other than the due date of the return? \_\_\_\_\_ (Mo/Da/Yr)

Would you like to pay any amount due on your <u>state</u> return(s) using electronic withdrawal? .....	<input type="checkbox"/> <input type="checkbox"/>
--	---

If Yes, what amount would you like withdrawn, if not the entire balance due? \_\_\_\_\_

If Yes, when should the withdrawal occur, if other than the due date of the return? \_\_\_\_\_ (Mo/Da/Yr)

The IRS and some states allow estimated payments to be electronically withdrawn on the due dates of the estimated payments.

Would you like to pay any estimated payments due for your <u>federal</u> return using electronic withdrawal? .....	<input type="checkbox"/> <input type="checkbox"/>
--	---

Would you like to pay any estimated payments due for your <u>state</u> return(s) using electronically withdrawal, if available? .....	<input type="checkbox"/> <input type="checkbox"/>
---	---

Name of bank or financial institution .....

Routing Transit Number (RTN) .....

Account number .....

Type of account:	<input type="checkbox"/> Checking	<input type="checkbox"/> Traditional Savings	<input type="checkbox"/> IRA Savings
	<input type="checkbox"/> Archer MSA Savings	<input type="checkbox"/> Coverdell Ed. Savings	<input type="checkbox"/> HSA Savings

Is this a business account?  Yes  No

Account owner  Taxpayer  Spouse  Joint

I confirm that the bank account information and the direct deposit/electronic withdrawal options selected above are correct.

Would you like any refunds owed to you directly deposited? .....	<b>Yes</b> <b>No</b>
Would you like to pay any amount due on your <u>federal</u> return using electronic withdrawal? .....	<input type="checkbox"/> <input type="checkbox"/>

If Yes, what amount would you like withdrawn, if not the entire balance due? \_\_\_\_\_

If Yes, when should the withdrawal occur, if other than the due date of the return? \_\_\_\_\_ (Mo/Da/Yr)

Would you like to pay any amount due on your <u>state</u> return(s) using electronic withdrawal? .....	<input type="checkbox"/> <input type="checkbox"/>
--	---

If Yes, what amount would you like withdrawn, if not the entire balance due? \_\_\_\_\_

If Yes, when should the withdrawal occur, if other than the due date of the return? \_\_\_\_\_ (Mo/Da/Yr)

The IRS and some states allow estimated payments to be electronically withdrawn on the due dates of the estimated payments.

Would you like to pay any estimated payments due for your <u>federal</u> return using electronic withdrawal? .....	<input type="checkbox"/> <input type="checkbox"/>
--	---

Would you like to pay any estimated payments due for your <u>state</u> return(s) using electronically withdrawal, if available? .....	<input type="checkbox"/> <input type="checkbox"/>
---	---

Name of bank or financial institution .....

Routing Transit Number (RTN) .....

Account number .....

Type of account:	<input type="checkbox"/> Checking	<input type="checkbox"/> Traditional Savings	<input type="checkbox"/> IRA Savings
	<input type="checkbox"/> Archer MSA Savings	<input type="checkbox"/> Coverdell Ed. Savings	<input type="checkbox"/> HSA Savings

Is this a business account?  Yes  No

Account owner  Taxpayer  Spouse  Joint

I confirm that the bank account information and the direct deposit/electronic withdrawal options selected above are correct.



2021

# U.S. Series I Savings Bonds Purchase

4B

Up to \$5,000 of your refund may be used to purchase U.S. Series I Savings Bonds for yourself, your spouse, and up to two other individuals, in \$50 increments.

Do you want to use any of your refund to purchase any U.S. Series I Savings Bonds? .....

Yes	No
-----	----

If Yes, provide the information requested for each type of bond you want to purchase using your refund.

If the purchase is for someone other than the taxpayer or spouse, or if the bond should have a co-owner or beneficiary, provide the name of the person receiving the bond (if not the taxpayer or spouse), the name of the person being designated as the co-owner of the bond, if applicable, the name of the person designated as the beneficiary of the bond, if applicable, and the amount of the bond to be purchased.

Joint:

Co-owner name .....

Beneficiary name .....

Amount of refund, if not the entire refund, to be used to purchase U.S. Series I Savings Bonds .....

Note: If filing a married filing joint return, bonds purchased will be jointly owned by the taxpayer and spouse. In this case, the spouse's name does not need to be entered as a co-owner. If the bonds will not be jointly owned by the taxpayer and spouse, the savings bond information should be entered in the taxpayer, spouse, or other owner areas below.

Taxpayer:

Co-owner name .....

Beneficiary name .....

Amount of refund, if not the entire refund, to be used to purchase U.S. Series I Savings Bonds .....

Spouse:

Co-owner name .....

Beneficiary name .....

Amount of refund, if not the entire refund, to be used to purchase U.S. Series I Savings Bonds .....

Bond purchases for someone other than the taxpayer or spouse:

Taxpayer name .....

Co-owner name .....

Beneficiary name .....

Amount of purchase .....

Taxpayer name .....

Co-owner name .....

Beneficiary name .....

Amount of purchase .....







2021

# Dividend Income

5B

## Dividend Information:

Include copies of all Forms 1099-DIV or other documents for dividends received

TSJ	Name of Payer	Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	Box 2a Total Capital Gain Distribution	U.S. Bond Interest Amount or Percent in Box 1a
A					
B					
C					
D					
E					
F					
G					
H					
I					
J					
K					
L					
M					
N					
<b>Total</b>					

Tax-Exempt Interest Code: 1 - 1099-DIV 2 - Private Activity Bonds 3 - Both

Code	Tax-Exempt Interest	2020 Gross Dividends Amount
A		
B		
C		
D		
E		
F		
G		
H		
I		
J		
K		
L		
M		
N		
<b>Total</b>		

## Enter Any Additional Information:


Note: List all items sold during the year on Form 7.



2021

# Interest Income and Foreign Information

5A

**Include all Forms 1099-INT or other documents for interest received**

**Interest Income:**

(List all items sold during the year on Form 7.)

Special Interest Code: 1 - Qualified Educational Series EE Bonds    2 - Seller Financed Mortgage Interest    3 - Early Withdrawal Penalty    4 - Nominee Interest    5 - Accrued Interest    6 - Original Issue Discount Adjustment    7 - Amortizable Bond Premium Adjustment

TSJ	Source	Interest Income	U.S. Bonds and Obligations	Code	Special Interest
A					
B					
C					
D					
E					

Tax-Exempt Interest Code: 1 - 1099-INT    2 - Private Activity Bond    3 - Both

Social Security No. of Home Buyer	Address of Individual from Whom Mortgage Interest Was Received	Code	Tax-Exempt Interest
A			
B			
C			
D			
E			

Federal Withholding	State Withholding	Investment Expenses	Tax Exempt Paid CUSIP No.	2020 Interest Amount
A				
B				
C				
D				
E				

**Foreign Taxes Paid or Accrued:**

Source	Name of Foreign Country Imposing Tax	X if Tax Accrued	Date Paid or Accrued (Mo/Da/Yr)	Tax Amount (in Foreign Currency)	Tax Amount (in U.S. Dollars)
A					
B					
C					
D					
E					

**Additional State Information:**

Payer ID	New Hampshire or Illinois Reason Interest is Nontaxable
A	
B	
C	
D	
E	

**Foreign Bank Accounts and Trusts:**

At any time during 2021, did you have an interest in or a signature authority over a financial account in a foreign country, such as a bank account, securities account or other financial account?  Yes     No

If Yes, enter name of foreign country \_\_\_\_\_

Were you the grantor of, or transferor to, a foreign trust that existed during 2021, whether or not you had any beneficial interest in it?



2021

# Dividend Income and Foreign Information

5B

**Dividend Income:** Include all Forms 1099-DIV or other documents for dividends received  
(List all items sold during the year on Form 7.)

TSJ	Source	Form 1099-DIV				
		Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	U.S. Bond Interest Amount or Percent in Box 1a	Code	Tax-Exempt Interest
A						
B						
C						
D						
E						

Form 1099-DIV					
Box 2a Total Capital Gain Distribution	Box 2b Unrecaptured Section 1250 Gain	Box 2c Section 1202 Gain	Box 2d Collectibles (28%) Gain	Box 3 Nondividend Distributions	2020 Gross Dividends Amount
A					
B					
C					
D					
E					

Tax-Exempt Interest Code:  
 1 - 1099-DIV  
 2 - Private Activity Bonds  
 3 - Both

Form 1099-DIV			
Box 4 Federal Withholding	Box 5 Section 199A Dividends	Box 6 Investment Expenses	State Withholding
A			
B			
C			
D			
E			

### Foreign Taxes Paid or Accrued:

Source	Name of Foreign Country Imposing Tax	X if Tax Accrued	Date Paid or Accrued (Mo/Da/Yr)	Tax Amount (in Foreign Currency)	Tax Amount (in U.S. Dollars)
A					
B					
C					
D					
E					

### Additional State Information:

Payer ID	New Hampshire Reason Dividend is Nontaxable
A	
B	
C	
D	
E	

### Foreign Bank Accounts and Trusts:

At any time during 2021, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?  Yes  No

If Yes, enter name of foreign country \_\_\_\_\_

Were you the grantor of, or transferor to, a foreign trust that existed during 2021, whether or not you had any beneficial interest in it?  Yes  No



2021

# Foreign Assets

5C

Note: If the aggregate value of the accounts does not exceed \$10,000, then you do not need to provide details.

## General Information:

TSJ ..... \_\_\_\_\_  
 Title of filer ..... \_\_\_\_\_  
 Enter all countries where you have foreign bank accounts ..... \_\_\_\_\_

## Foreign Identification:

Yes	No

Passport ..... \_\_\_\_\_  
 Foreign TIN ..... \_\_\_\_\_  
 If not passport or TIN, enter description ..... \_\_\_\_\_  
 Number ..... \_\_\_\_\_  
 Country of issue ..... \_\_\_\_\_

## Information on Foreign Financial Accounts:

1 - Bank Account    2 - Securities Account    3 - Other

Account Type	If Other Account Type, Describe	Maximum Account Value	Account Number	Financial Institution Name
A				
B				

Street Address	City
A	
B	

State	ZIP/Postal Code	Country	GIIN
A			
B			

If you have no financial interest in the account or account is jointly owned, please complete the account owner information below.

Type of TIN Code: A - Employer Identification No. (EIN)    B - SSN or ITIN    C - Foreign

Last Name or Organization Name	First Name	Middle Initial	Suffix	Taxpayer ID Number
A				
B				

# of Joint Owners	Street Address	City
A		
B		

1 - No financial interest    1B - No financial interest - US person, officer or employee, residing outside US    2A - Joint - spouse is joint owner    2B - Joint - other joint owner    3 - Consolidated

State	ZIP/Postal Code	Country	Ownership Code	Filer's Title
A				
B				

1 - Deposit    2 - Custodial

Type	Foreign Currency	Exchange Rate	Source of Exchange	Acct Open	Acct Closed	Joint	No Tax Items Reported
A							
B							



2021

# Foreign Assets

5D

## Asset Information:

Description	Identifying Number	Date Acquired (Mo/Da/Yr)	Date Sold (Mo/Da/Yr)	Jointly Owned	No Tax Items Reported

  

Value	Foreign Currency	Exchange Rate	Source of Exchange Rate

## If Asset is Stock of a Foreign Entity or an Interest in a Foreign Entity

1 - Partnership 2 - Corporation 3 - Trust 4 - Estate

Name of Foreign Entity	Type of Foreign Entity	Mailing Address of Foreign Entity

City or Town of Foreign Entity	Province, County or State of Foreign Entity	Country of Foreign Entity	Postal Code of Foreign Entity	GIIN

## If Asset is NOT Stock of a Foreign Entity or an Interest in a Foreign Entity

1 - Issuer 2 - Counterparty

1 - U.S. person  
2 - Foreign person

Name of Issuer	Issuer Code	Type of Issuer	Residence of Issuer

1 - Individual 2 - Partnership 3 - Corporation 4 - Trust 5 - Estate

Mailing Address of Issuer	City or Town of Issuer

Province, County or State of Issuer	Country of Issuer	Postal Code of Issuer

Foreign assets were acquired or sold during the tax year .....  Yes  No

## Foreign Bank Accounts and Trusts:

At any time during 2021, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account or other financial account? .....  Yes  No

If Yes, enter name of foreign country .....

Were you the grantor of, or transferor to, a foreign trust that existed during 2021, whether or not you had any beneficial interest in it? .....  Yes  No



2021

# Brokerage Statement Details

5EA

	TSJ	Payer Name	Account No.	Information Included (X or ✓)
A				
B				
C				
D				
E				
F				
G				
H				
I				
J				
K				
L				
M				
N				
O				
P				
Q				
R				
S				
T				

	Interest Income	U.S. Bonds and Obligations	Code	Tax-Exempt Interest	Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	Box 2a Total Capital Gain Distribution	U.S. Bond Interest Amount or Percent in Box 1a
A								
B								
C								
D								
E								
F								
G								
H								
I								
J								
K								
L								
M								
N								
O								
P								
Q								
R								
S								
T								

▲

Tax-Exempt Interest Code: 1 - 1099-DIV/1099-INT 2 - Private Activity Bonds 3 - Both

Note: For other amounts not listed, attach a copy of your brokerage statement.



2021

# Consolidated Brokerage Statement

5E

Brokerage Name	TSJ	Account Number
----------------	-----	----------------

Brokerage Address
-------------------

## Interest Income and Foreign Information

Interest Income: (List all items sold during the year on Form 5G.)

Special Interest Code: 2 - Early Withdrawal Penalty 4 - Accrued Interest 6 - Amortizable Bond  
 1 - Qualified Educational Series EE Bonds 3 - Nominee Interest 5 - Original Issue Discount Adjustment Premium Adjustment

	Source	Interest Income	U.S. Bonds and Obligations	Code	Special Interest
A					
B					
C					
D					
E					

Tax-Exempt Interest Code: 1 - 1099-INT 2 - Private Activity Bond 3 - Both

Code	Tax-Exempt Interest	Investment Expenses	Federal Withholding	State Withholding	Tax Exempt Bond CUSIP No.	2020 Interest Amount
A						
B						
C						
D						
E						

### Foreign Taxes Paid or Accrued:

	Source	Name of Foreign Country Imposing Tax	X if Tax Accrued	Date Paid or Accrued (Mo/Da/Yr)	Tax Amount (in Foreign Currency)	Tax Amount (in U.S. Dollars)
A						
B						
C						
D						
E						

### Additional State Information:

	Payer ID	New Hampshire or Illinois Reason Interest is Nontaxable
A		
B		
C		
D		
E		





2021

# Consolidated Brokerage Statement Dividend Income and Foreign Information

5F

List all items sold during the year on Form 5G.

Tax-Exempt Interest Code: 1 - 1099-DIV 2 - Private Activity Bonds 3 - Both

### Dividend Income:



	Source	Form 1099-DIV				
		Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	U.S. Bond Interest Amount or Percent in Box 1a	Code	Tax-Exempt Interest
A						
B						
C						
D						
E						

Form 1099-DIV					
Box 2a Total Capital Gain Distribution	Box 2b Unrecaptured Section 1250 Gain	Box 2c Section 1202 Gain	Box 2d Collectibles (28%) Gain	Box 3 Nondividend Distributions	2020 Gross Dividends Amount
A					
B					
C					
D					
E					

Form 1099-DIV			
Box 4 Federal Withholding	Box 5 Section 199A Dividends	Box 6 Investment Expenses	State Withholding
A			
B			
C			
D			
E			

### Foreign Taxes Paid or Accrued:

	Source	Name of Foreign Country Imposing Tax	X if Tax Accrued	Date Paid or Accrued (Mo/Da/Yr)	Tax Amount (in Foreign Currency)	Tax Amount (in U.S. Dollars)
A						
B						
C						
D						
E						

### Additional State Information:

Payer ID	New Hampshire Reason Dividend is Nontaxable
A	
B	
C	
D	
E	



Consolidated Brokerage Statement Sales of Stocks, Securities, Capital Assets and Miscellaneous Income

5G

Gains or Losses from Sales of Stocks, Securities and Other Capital Assets:

Include all Forms 1099-A, 1099-B, 1099-MISC, 1099-S and copies of mutual fund statements for the year

Did you have any of the following during the year?

Table with 2 columns: Yes, No. Rows include Mutual fund transactions, Exchange of any securities or investments for something other than cash, Sales of inherited property, Sales of any stock or stock options at a loss and purchases of the same or substantially similar stock or options 30 days before or 30 days after the sale, Commodity sales, short sales or straddles, Reinvestment of the proceeds of the sale of a publicly traded security into an SSBIC interest, Reinvestment of the proceeds of the sale of qualified small business stock in other qualified small business stock, Securities which became worthless.

Table with 4 columns: Kind of Property and Description, Quantity, Date Acquired (Mo/Da/Yr), Date Sold (Mo/Da/Yr). Rows A, B, C, D.

Table with 4 columns: Gross Sales Price (Less Commissions), Cost or Other Basis, Federal Tax Withheld, State Tax Withheld. Rows A, B, C, D.

Other Income:

Table with 3 columns: Nature and Source, 2021 Amount, 2020 Amount.

Other Adjustments to Income:

Table with 3 columns: Nature and Source, 2021 Amount, 2020 Amount.

Investment Interest Expense:

Interest paid on money you borrowed that is allocable to property held for investment.

Table with 3 columns: Paid To, 2021 Amount, 2020 Amount.

Foreign Bank Accounts and Trusts:

At any time during 2021, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? Yes No

If Yes, enter name of foreign country

Were you the grantor of, or transferor to, a foreign trust that existed during 2021, whether or not you had any beneficial interest in it? Yes No



2021

# Business Income and Cost of Goods Sold

Name of Business: \_\_\_\_\_

Principal Business or Profession: \_\_\_\_\_

TSJ \_\_\_\_\_  
 Employer ID number \_\_\_\_\_  
 Street address \_\_\_\_\_  
 City, state, ZIP or postal code, and country \_\_\_\_\_  
 Method of inventory \_\_\_\_\_  
 Method of accounting \_\_\_\_\_

### Business Questions for 2021:

	Yes	No
Did you dispose of this business? _____	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, what was the disposition date? _____ (Mo/Da/Yr)		
Was there a change in determining quantities, costs or valuations between opening and closing inventory? _____	<input type="checkbox"/>	<input type="checkbox"/>
Were you involved in the operations of this business on a regular, continuous and substantial basis? _____	<input type="checkbox"/>	<input type="checkbox"/>
Have you prepared or will you prepare all required Forms 1099? _____	<input type="checkbox"/>	<input type="checkbox"/>

2021 Amount	2020 Amount

Health insurance premiums paid for yourself and your dependents \_\_\_\_\_

### Income:

Include all Forms 1099-K

Payment card and third party transactions:

Description	2021 Amount	2020 Amount

Miscellaneous income:  Include all Forms 1099-MISC and 1099-NEC

Description	2021 Amount	2020 Amount

Other Income:

Description	2021 Amount	2020 Amount

Other gross receipts or sales \_\_\_\_\_  
 Less returns and allowances \_\_\_\_\_

### Cost of Goods Sold:

2021 Amount	2020 Amount

Beginning inventory \_\_\_\_\_  
 Purchases less cost of items withdrawn for personal use \_\_\_\_\_  
 Cost of labor (do not include amounts paid to yourself) \_\_\_\_\_  
 Materials and supplies \_\_\_\_\_  
 Other costs of goods sold: \_\_\_\_\_

Description	2021 Amount	2020 Amount

Ending inventory \_\_\_\_\_





2021

# Business Expenses - Vehicle and Other Listed Property

6B

Name of Business: \_\_\_\_\_

Principal Business or Profession: \_\_\_\_\_

### Listed Property Questions for 2021:

Do you have evidence to support your deduction? .....	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, is the evidence written? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you have evidence to support the business use percentage claimed on listed property? .....	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, is the evidence written? .....	<input type="checkbox"/>	<input type="checkbox"/>

### If you are an employer who provides vehicles for use by employees:

Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	<input type="checkbox"/>	<input type="checkbox"/>
Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? ..	<input type="checkbox"/>	<input type="checkbox"/>
Do you treat all use of vehicles by employees as personal use? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles and retain the information received? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you meet the requirements for qualified demonstration use by maintaining a written policy statement that prohibits vehicle use by individuals other than full-time vehicle salespersons, use for personal vacation trips, storage of personal possessions in the vehicle and limits the total mileage outside the salesperson's normal working hours? .....	<input type="checkbox"/>	<input type="checkbox"/>

### Vehicle:

Description of vehicle .....

Date placed in service ..... (Mo/Da/Yr)

Do you (or your spouse) have another vehicle available for your personal use?  Yes  No

Was your vehicle available for use during off-duty hours? .....

Vehicle 1	
Description of vehicle .....	
Date placed in service ..... (Mo/Da/Yr)	
Do you (or your spouse) have another vehicle available for your personal use? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Was your vehicle available for use during off-duty hours? .....	
2021 Miles	2020 Miles
2021 Amount	2020 Amount

Vehicle 2	
Description of vehicle .....	
Date placed in service ..... (Mo/Da/Yr)	
Do you (or your spouse) have another vehicle available for your personal use? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Was your vehicle available for use during off-duty hours? .....	
2021 Miles	2020 Miles
2021 Amount	2020 Amount

### Mileage:

Total miles .....

Total business miles .....

Total commuting miles for the year ..

### Actual Expenses:

Gasoline, oil, repairs, insurance, etc ..

Interest .....

Taxes .....

Fair market value of leased vehicle ..

Vehicle rentals/leases .....





2021

# Business Use of Home

6D

Name of Business: \_\_\_\_\_

Principal Business or Profession: \_\_\_\_\_

### Partial Use of Your Home for Business:

	2021	2020
Square footage of home used exclusively for business .....		
Total square footage of home .....		
Total hours home was used for day care during the year .....		

Was your home used for day care purposes for the entire year? ..... 

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

Were improvements made to the home and/or home office since the time you began using the home for business? ..... 

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

### Expenses: Enter all expenses at 100 percent

Direct expenses benefit the business part of your home.  
 Example: Cost of painting or repairs made to the specific area or room used for business.

Indirect expenses are required for keeping up and running your entire home.  
 Example: Real estate taxes.

	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount
Casualty losses .....				
Deductible mortgage interest paid to:				
Financial institutions .....				
Individuals .....				
Real estate taxes .....				
Insurance .....				
Qualified mortgage insurance premiums .....				
Repairs and maintenance .....				
Utilities .....				
Rent .....				

### Other Expenses:

Description	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount

### Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	Address of Individual to Whom Mortgage Interest Was Paid



# Sales of Stocks, Securities, Capital Assets & Installment Sales

**Gains or Losses from Sales of Stocks, Securities and Other Capital Assets:**

Include all Forms 1099-A, 1099-B, 1099-S and copies of mutual fund statements for the year

Did you have any of the following during the year?

	Yes	No
Mutual fund transactions .....	<input type="checkbox"/>	<input type="checkbox"/>
Exchange of any securities or investments for something other than cash .....	<input type="checkbox"/>	<input type="checkbox"/>
Sales of inherited property .....	<input type="checkbox"/>	<input type="checkbox"/>
Sales of any stock or stock options at a loss and purchases of the same or substantially similar stock or options 30 days before or 30 days after the sale .....	<input type="checkbox"/>	<input type="checkbox"/>
Commodity sales, short sales or straddles .....	<input type="checkbox"/>	<input type="checkbox"/>
Reinvestment of the proceeds of gains in a qualified opportunity fund .....	<input type="checkbox"/>	<input type="checkbox"/>
Sale of any investments in qualified opportunity funds .....	<input type="checkbox"/>	<input type="checkbox"/>
Debts that became uncollectible .....	<input type="checkbox"/>	<input type="checkbox"/>
Securities that became worthless .....	<input type="checkbox"/>	<input type="checkbox"/>
Sale of any property where you will receive payments in future years .....	<input type="checkbox"/>	<input type="checkbox"/>

TSJ	Kind of Property and Description	Quantity	Date Acquired (Mo/Da/Yr)	Date Sold (Mo/Da/Yr)
A				
B				
C				
D				
E				
F				
G				
H				

	Gross Sales Price (Less Commissions)	Cost or Other Basis	Federal Tax Withheld	State Tax Withheld
A				
B				
C				
D				
E				
F				
G				
H				

**Installment Sales:** Do not include interest received in principal amount

TSJ	Property Description	Date Sold (Mo/Da/Yr)	2021 Principal Received	2020 Principal Received





# Sale of Your Home and Moving Expenses

## Sale or Exchange of Your Home:

Include the closing statements from the purchase and sale of your former and new homes

### Former Home Information:

TSJ ..... \_\_\_\_\_

Date acquired ..... (Mo/Da/Yr) \_\_\_\_\_

Date sold ..... (Mo/Da/Yr) \_\_\_\_\_

Selling price .....

### Original Cost and Cost of Improvements:

Description	Amount

### Sale Expenses:

Commissions, legal fees, advertising and other expenses.

Description	Amount

Did you personally own and occupy the home for at least 2 of the 5 years preceding the sale?  Yes  No

If your spouse is deceased, did the sale occur within two years of the date of death and did your spouse live in the home for at least 2 of the 5 years preceding the sale?  Yes  No

If you had a foreign mortgage on the above property, please provide the amount of the mortgage retired on the sale and the date the mortgage was acquired or the date the mortgage was most recently renegotiated \_\_\_\_\_

## Moving Expenses:

TSJ ..... \_\_\_\_\_

Were the moving expenses reimbursed by your employer?  Yes  No

Enter reimbursements not included in wages on your Form W-2

Was the move due to a permanent change of station pursuant to a military order?  Yes  No

### Mileage:

Number of miles from old home to new workplace (applicable only on some state returns) .....

Number of miles from old home to old workplace (applicable only on some state returns) .....

Number of automobile miles in move .....

### Transportation Expenses:

	Amount
Costs of transportation of household goods and personal effects .....	<input type="text"/>
Costs of travel and lodging (do not include meals or automobile expenses) .....	<input type="text"/>
Automobile expenses (gasoline, oil, etc.) .....	<input type="text"/>
Meals (Pennsylvania only) .....	<input type="text"/>





2021

# Pension, Annuity and Retirement Plan Information

9A

**Pensions and Annuities:** Include all Forms 1099-R and any nontaxable distribution details

TSJ	Name of Payer	2021 Gross Distributions	Taxable Amount	Federal Tax Withheld	State Tax Withheld	Is this a Rollover?	2020 Gross Distributions

**Self-Employed Retirement Plan:** Include copies of all Forms 1099-R

Have you established a self-employed retirement or SIMPLE plan with deductible contributions? .....

Do you want to contribute the maximum amount allowed? .....

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Contributions to:**

Simplified employee pension plan .....

Defined benefit plan .....

Defined contribution plan .....

SIMPLE plan .....

2021 Amount	2021 Amount



2021

# Rental and Royalty Income

**Location of Property:** \_\_\_\_\_

TSJ . . . . . \_\_\_\_\_

Type of property . . . . . \_\_\_\_\_

Have you prepared or will you prepare all required Forms 1099? 

Yes	No

Ownership percentage if not 100% . . . . . \_\_\_\_\_ %

How many days was this property rented at fair market value? . . . . . \_\_\_\_\_

How many days was this property used personally (including use by family members)? . . . . . \_\_\_\_\_

2021	2020

**Income:**

Rents received . . . . . \_\_\_\_\_

Royalties received . . . . . \_\_\_\_\_

2021 Amount	2020 Amount

Payment card and third party transactions:  Include all Forms 1099-K

Description	2021 Amount	2020 Amount

Miscellaneous income:  Include all Forms 1099-MISC

Description	2021 Amount	2020 Amount

Other income:

Description	2021 Amount	2020 Amount





2021

# Rental and Royalty Property and Equipment & Depletion

10B

Location of Property: \_\_\_\_\_

Property and Equipment:  Include a list if more space is needed

**Acquisitions:**

X if not new	Description	Date Acquired (Mo/Da/Yr)	Cost

**Dispositions:**

Description	Date Acquired (Mo/Da/Yr)	Cost	Date Sold (Mo/Da/Yr)	Selling Price

**Percentage Depletion Information:**

Production Type	Royalty Income	
	2021 Amount	2020 Amount



2021

# Rental and Royalty Vehicle and Other Listed Property

Location of Property: \_\_\_\_\_

### Listed Property Questions for 2021:

	<b>Yes</b>	<b>No</b>
Do you have evidence to support your deduction? .....	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, is the evidence written? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you have evidence to support the business use percentage claimed on listed property? .....	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, is the evidence written? .....	<input type="checkbox"/>	<input type="checkbox"/>

### If you are an employer who provides vehicles for use by employees:

	<b>Yes</b>	<b>No</b>
Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	<input type="checkbox"/>	<input type="checkbox"/>
Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? ..	<input type="checkbox"/>	<input type="checkbox"/>
Do you treat all use of vehicles by employees as personal use? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles and retain the information received? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you meet the requirements for qualified demonstration use by maintaining a written policy statement that prohibits vehicle use by individuals other than full-time vehicle salespersons, use for personal vacation trips, storage of personal possessions in the vehicle and limits the total mileage outside the salesperson's normal working hours? .....	<input type="checkbox"/>	<input type="checkbox"/>

### Vehicle:

Description of vehicle .....

Date placed in service . . . . (Mo/Da/Yr) \_\_\_\_\_

Do you (or your spouse) have another vehicle available for your personal use? .....

Was your vehicle available for use during off-duty hours? .....

Vehicle 1	
<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/> Yes <input type="checkbox"/> No	
2021 Miles	2020 Miles
2021 Amount	2020 Amount

Vehicle 2	
<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/> Yes <input type="checkbox"/> No	
2021 Miles	2020 Miles
2021 Amount	2020 Amount

### Mileage:

Total miles .....

Total business miles .....

Total commuting miles for the year ..

### Actual Expenses:

Gasoline, oil, repairs, insurance, etc ..

Interest .....

Taxes .....

Fair market value of leased vehicle ..

Vehicle rentals/leases .....



2021

# Rental and Royalty Business Expenses

10D

Location of Property: \_\_\_\_\_

Business Expenses: Enter all expenses at 100 percent

If not 100%, enter the percentage to apply to this business ..... %

	2021 Amount	2020 Amount
Parking fees and tolls .....		
Local transportation .....		
Travel expenses .....		
Meals .....		
Entertainment (deductible only on some state returns) .....		
Other Business Expenses:		

Description	2021 Amount	2020 Amount

Reimbursements: List only reimbursements NOT reported in Box 1 of your Form W-2

	2021 Amount	2020 Amount
Amount received for other expenses .....		
Amount received for meals .....		
Amount received for entertainment .....		

**Vehicle:**

If not 100%, enter the percentage to apply to this business ..... %

Description of vehicle .....

Date vehicle was placed in service ..... (Mo/Da/Yr)

Do you (or your spouse) have another vehicle available for personal purposes? .....

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

Was your vehicle available for personal use during off-duty hours? .....

	2021	2020
Total miles .....		
Total business miles .....		
Average daily commuting miles .....		
Total commuting miles for the year .....		
Gasoline and oil .....		
Repairs .....		
Insurance .....		
Interest .....		
Taxes .....		
Value of employer provided vehicle .....		
Temporary vehicle rentals .....		
Fair market value of leased vehicle .....		
Vehicle leases .....		
Other Vehicle Expenses:		

Description	2021 Amount	2020 Amount





2021

# Rental - Business Use of Home

10E

Location of Property: \_\_\_\_\_

### Partial Use of Your Home for Business:

2021

Square footage of home used exclusively for business .....

Total square footage of home .....

Were improvements made to the home and/or home office since the time you began using the home for business? ..  Yes  No

### Expenses: Enter all expenses at 100 percent

Direct expenses benefit the business part of your home.  
 Example: Cost of painting or repairs made to the specific area or room used for business.

Indirect expenses are required for keeping up and running your entire home.  
 Example: Real estate taxes.

	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount
Casualty losses .....				
Deductible mortgage interest paid to:				
Financial institutions .....				
Individuals .....				
Real estate taxes .....				
Insurance .....				
Qualified mortgage insurance premiums .....				
Repairs and maintenance .....				
Utilities .....				
Rent .....				

### Other Expenses:

Description	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount

### Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	Address of Individual to Whom Mortgage Interest Was Paid





2021

# Partnership and S Corporation Business Expenses

11A

**Activity Name:** .....

**Business Expenses:** Enter all expenses at 100 percent

If not 100%, enter the percentage to apply to this business ..... %

	2021 Amount	2020 Amount
Parking fees and tolls .....		
Local transportation .....		
Travel expenses .....		
Meals .....		
Entertainment (deductible only on some state returns) .....		
Other Business Expenses:		

Description	2021 Amount	2020 Amount

**Reimbursements:** List only reimbursements NOT reported in Box 1 of your Form W-2

	2021 Amount	2020 Amount
Amount received for other expenses .....		
Amount received for meals .....		
Amount received for entertainment .....		

**Vehicle:**

If not 100%, enter the percentage to apply to this business ..... %

Description of vehicle .....

Date vehicle was placed in service ..... (Mo/Da/Yr)

Do you (or your spouse) have another vehicle available for personal purposes? .....

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

Was your vehicle available for personal use during off-duty hours? .....

	2021	2020
Total miles .....		
Total business miles .....		
Average daily commuting miles .....		
Total commuting miles for the year .....		
Gasoline and oil .....		
Repairs .....		
Insurance .....		
Interest .....		
Taxes .....		
Value of employer provided vehicle .....		
Temporary vehicle rentals .....		
Fair market value of leased vehicle .....		
Vehicle leases .....		
Other Vehicle Expenses:		

Description	2021 Amount	2020 Amount



2021

# Passthrough Business Use of Home

11B

Activity Name: .....

### Partial Use of Your Home for Business:

2021

Square footage of home used exclusively for business .....

Total square footage of home .....

Were improvements made to the home and/or home office since the time you began using the home for business? ...  Yes  No

### Expenses: Enter all expenses at 100 percent

Direct expenses benefit the business part of your home.

Example: Cost of painting or repairs made to the specific area or room used for business.

Indirect expenses are required for keeping up and running your entire home.

Example: Real estate taxes.

	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount
Casualty losses .....				
Deductible mortgage interest paid to:				
Financial institutions .....				
Individuals .....				
Real estate taxes .....				
Insurance .....				
Qualified mortgage insurance premiums .....				
Repairs and maintenance .....				
Utilities .....				
Rent .....				

### Other Expenses:

Description	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount

### Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	Address of Individual to Whom Mortgage Interest Was Paid



2021

# Farm Income (Page 1 of 2)

Proprietor's Name: \_\_\_\_\_

Principal Crop or Activity: \_\_\_\_\_

TSJ \_\_\_\_\_  
Employer identification number \_\_\_\_\_  
Method of accounting \_\_\_\_\_

### Farm Questions for 2021:

Did you dispose of this farm?  Yes  No  
If Yes, what was the disposition date? \_\_\_\_\_ (Mo/Da/Yr)  
Have you prepared or will you prepare all required Forms 1099?

2021 Amount	2020 Amount
Health insurance premiums paid for yourself and your dependents _____	

### Sales of Livestock and Other Items Bought for Resale (Cash Method Only):

Description	2021		2020	
	Amount Received	Cost or Other Basis	Amount Received	Cost or Other Basis

### Income (Accrual Method):

Description	Beginning Inventory	Cost of Items Purchased	Sales	Ending Inventory

### Income:

	2021 Amount	2020 Amount
Sales of livestock, produce, grains, etc. you raised		
Total cooperative distributions (Forms 1099-PATR)		
Taxable cooperative distributions		
Total agricultural program payments		
Taxable agriculture program payments		
Total Commodity Credit Corporation (CCC) loans		
Total crop insurance proceeds and certain disaster payments received in 2021		
Taxable crop insurance proceeds received		
Crop insurance proceeds deferred from prior year		
Custom hire (machine work) income		
Federal gasoline tax or fuel tax credit or refund		
State gasoline tax or fuel tax credit or refund		



2021

# Farm Income (Page 2 of 2)

12A

Proprietor's Name: \_\_\_\_\_

Principal Crop or Activity: .. \_\_\_\_\_

**Income:**

Payment card and third party transactions:  Include all Forms 1099-K

Description	2021 Amount	2020 Amount

Government payments:  Include all Forms 1099-G

Description	2021 Amount	2020 Amount

Miscellaneous income:  Include all Forms 1099-MISC and 1099-NEC

Description	2021 Amount	2020 Amount

Other income:

Description	2021 Amount	2020 Amount





2021

# Farm Vehicle and Other Listed Property

12C

Proprietor's Name: \_\_\_\_\_

Principal Crop or Activity: \_\_\_\_\_

### Listed Property Questions for 2021:

Do you have evidence to support your deduction? .....	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, is the evidence written? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you have evidence to support the business use percentage claimed on listed property? .....	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, is the evidence written? .....	<input type="checkbox"/>	<input type="checkbox"/>

### If you are an employer who provides vehicles for use by employees:

Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	<input type="checkbox"/>	<input type="checkbox"/>
Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? ..	<input type="checkbox"/>	<input type="checkbox"/>
Do you treat all use of vehicles by employees as personal use? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles and retain the information received? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you meet the requirements for qualified demonstration use by maintaining a written policy statement that prohibits vehicle use by individuals other than full-time vehicle salespersons, use for personal vacation trips, storage of personal possessions in the vehicle and limits the total mileage outside the salesperson's normal working hours? .....	<input type="checkbox"/>	<input type="checkbox"/>

### Vehicle:

Description of vehicle .....

Date placed in service . . . (Mo/Da/Yr) \_\_\_\_\_

Do you (or your spouse) have another vehicle available for your personal use? .....

Was your vehicle available for use during off-duty hours? .....

Vehicle 1	
Description of vehicle .....	
Date placed in service . . . (Mo/Da/Yr) _____	
Do you (or your spouse) have another vehicle available for your personal use? .....	
<input type="checkbox"/> Yes	<input type="checkbox"/> No
Was your vehicle available for use during off-duty hours? .....	
<input type="checkbox"/> Yes	<input type="checkbox"/> No
2021 Miles	2020 Miles
2021 Amount	2020 Amount

Vehicle 2	
Description of vehicle .....	
Date placed in service . . . (Mo/Da/Yr) _____	
Do you (or your spouse) have another vehicle available for your personal use? .....	
<input type="checkbox"/> Yes	<input type="checkbox"/> No
Was your vehicle available for use during off-duty hours? .....	
<input type="checkbox"/> Yes	<input type="checkbox"/> No
2021 Miles	2020 Miles
2021 Amount	2020 Amount





2021

# Farm Business Expenses

12D

Proprietor's Name: \_\_\_\_\_

Principal Crop or Activity: \_\_\_\_\_

Business Expenses: **Enter all expenses at 100 percent**

If not 100%, enter the percentage to apply to this business \_\_\_\_\_ %

	2021 Amount	2020 Amount
Parking fees and tolls .....		
Local transportation .....		
Travel expenses .....		
Meals .....		
Entertainment (deductible only on some state returns) .....		

Other Business Expenses:

Description	2021 Amount	2020 Amount

### Reimbursements:

**List only reimbursements NOT reported in Box 1 of your Form W-2**

	2021 Amount	2020 Amount
Amount received for other expenses .....		
Amount received for meals .....		
Amount received for entertainment .....		

### Vehicle:

If not 100%, enter the percentage to apply to this business \_\_\_\_\_ %

Description of vehicle .....

Date vehicle was placed in service ..... (Mo/Da/Yr)

Do you (or your spouse) have another vehicle available for personal purposes? .....

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

Was your vehicle available for personal use during off-duty hours? .....

	2021	2020
Total miles .....		
Total business miles .....		
Average daily commuting miles .....		
Total commuting miles for the year .....		
Gasoline and oil .....		
Repairs .....		
Insurance .....		
Interest .....		
Taxes .....		
Value of employer provided vehicle .....		
Temporary vehicle rentals .....		
Fair market value of leased vehicle .....		
Vehicle leases .....		

Other Vehicle Expenses:

Description	2021 Amount	2020 Amount



2021

# Farm Business Use of Home

12E

Proprietor's Name: \_\_\_\_\_

Principal Crop or Activity: \_\_\_\_\_

### Partial Use of Your Home for Business:

2021

Square footage of home used exclusively for business .....

Total square footage of home .....

Were improvements made to the home and/or home office since the time you began using the home for business? ...  Yes  No

### Expenses: Enter all expenses at 100 percent

Direct expenses benefit the business part of your home.  
Example: Cost of painting or repairs made to the specific area or room used for business.

Indirect expenses are required for keeping up and running your entire home.  
Example: Real estate taxes.

	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount
Casualty losses .....				
Deductible mortgage interest paid to:				
Financial institutions .....				
Individuals .....				
Real estate taxes .....				
Insurance .....				
Qualified mortgage insurance premiums .....				
Repairs and maintenance .....				
Utilities .....				
Rent .....				

### Other Expenses:

Description	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount

### Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	Address of Individual to Whom Mortgage Interest Was Paid



2021

# Miscellaneous Income, Adjustments and Alimony

Include Forms: W-2G, 1099-MISC, 1099-NEC, 1099-RRB, 1099-SSA, 1099-SA, 1099-LTC, 1099-QA, and 1099-G

### Miscellaneous Income and Adjustments:

	TSJ _____		TSJ _____	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount
Unemployment compensation received .....				
Unemployment compensation repaid in 2021 .....				
Social security benefits received .....				
Social security benefits repaid in 2021 .....				
Medicare premiums withheld .....				
Tier 1 railroad retirement benefits received .....				
Tier 1 railroad retirement benefits repaid in 2021 .....				
Total lump sum social security received .....				
Lump sum taxable social security .....				
Other federal withholding .....				
Other state withholding .....				

### State and Local Income Tax Refunds:

TSJ	State	City	Tax Year	Income Tax Refund	
				State	Local

### Other Income:

TSJ	Nature and Source	2021 Amount	2020 Amount

### Alimony Paid or Received:

TSJ	Recipient's Name	Recipient's Social Security Number	Date of Original Divorce or Separation (Mo/Da/Yr)	Date Divorce or Separation Agreement Modified (Mo/Da/Yr)	Alimony Received?	2021 Amount	2020 Amount



2021

# Miscellaneous Adjustments

13A

**Educator Expenses:** Deduction for amounts paid by educators of kindergarten through Grade 12

TS	2021 Amount	2020 Amount

**Health Savings Accounts (HSAs)**

TS	Description	2021 Amount	2020 Amount
	Contributions made for 2021		
	Distributions received from all HSAs in 2021		

What type of coverage applies to your high deductible health plan?  Self only  Family

Were any HSA contributions listed above also shown on your Form W-2? .....

Were all distributions from your HSA for unreimbursed medical expenses? .....

Did you or your spouse enroll in Medicare? .....

If Yes, what month did you enroll? .....

What month did your spouse enroll? .....

Yes	No

**Other Adjustments to Income:** Include all Forms 1098-E for Student Loan Interest Paid

TSJ	Nature and Source	2021 Amount	2020 Amount



2021

# Ministerial Income

13B

TS .....

Do you have any expenses associated with a business as a minister? .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If Yes, enter the name of the business: \_\_\_\_\_

Do you have any expenses associated with your wages received as a minister? .....

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

If Yes, enter the occupation: \_\_\_\_\_

### Parsonage:

Fair rental value of parsonage provided by church .....

Utility allowance of parsonage .....

Actual expenses for utilities of parsonage .....

2021 Amount	2020 Amount

### Rental or Parsonage Allowance:

Parsonage or rental allowance .....

Utility allowance .....

Actual expenses for parsonage .....

Actual expenses for utilities .....

Fair rental value of home, plus the cost of utilities .....

2021 Amount	2020 Amount



# Itemized Deductions - Medical and Taxes

### Medical and Dental Expenses:

Prescription medicines and drugs .....  
 Total medical insurance premiums paid \* .....  
 Long-term care expenses .....  
 Total insurance reimbursement .....  
 Number of miles traveled for medical care .....  
 Lodging .....  
 Doctors, dentists, etc. ....  
 Hospitals .....  
 Lab fees .....  
 Eyeglasses and contacts .....

TSJ	2021 Amount	2020 Amount

2021 Amount	2020 Amount

Taxpayer long-term care insurance premiums paid .....  
 Spouse long-term care insurance premiums paid .....

\* Do not include Medicare premiums or premiums deducted in computing taxable wages reported on a W-2.

### Other Medical Expenses:

TSJ	Description	2021 Amount	2020 Amount

### Taxes Paid: Include copies of your tax bills

Personal property taxes paid (include vehicle taxes) .....  
 General sales taxes paid on specified items .....

TSJ	2021 Amount	2020 Amount

Itemize real estate taxes by state.

TSJ	Real Estate Taxes	2021 Amount	2020 Amount

### Other Taxes Paid:

TSJ	Description	2021 Amount	2020 Amount

If you purchased or sold your home in 2021, did you include any taxes from your closing statement in the amounts above?  Yes  No



**Mortgage Questions for 2021:**

	<b>Yes</b>	<b>No</b>
If you purchased or sold your home, did you include any mortgage interest from your closing statement in the amount below? . . .	<input type="checkbox"/>	<input type="checkbox"/>
Did you refinance your home? (If Yes, enclose the closing statement.) . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, how many years is your new mortgage loan? . . . . . _____		
Did you purchase a new home or sell your former home during the year? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, enclose the closing statements from the purchase and sale of your new and former homes.		
If Yes, also, did you (or your spouse, if married) have an ownership interest in a principal residence in the US during the 3 year period prior to the purchase of this home? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, did you (and your spouse, if married at the time of purchase) own and use the same home as a principal residence in the U.S. for any 5 consecutive year period during the 8 year period ending on the purchase date of the new home? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>

**Home Mortgage Interest Paid To Financial Institutions:**

TSJ	Paid To	Did You Receive Form 1098?		2021 Amount	2020 Amount
		Yes	No		

**Other Home Mortgage Interest Paid:**

TSJ	Paid To		ID Number	2021 Amount	2020 Amount
	Name	Address			

**Deductible Points:**

TSJ	Paid To	Did You Receive Form 1098?		2021 Amount	2020 Amount
		Yes	No		

**Mortgage Insurance Premiums:**

Premiums paid or accrued for qualified mortgage insurance.

TSJ	2021 Amount	2020 Amount

**Investment Interest Expense:**

Interest paid on money you borrowed that is allocable to property held for investment.

TSJ	Paid To	2021 Amount	2020 Amount



# Itemized Deductions - Contributions

**Cash Contributions:** Include all Forms 1098-C or other documentation.

You cannot deduct a cash contribution, regardless of the amount, unless you keep as a record of the contribution a bank record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and amount of the contribution. Clothes and household items donated must be in good, used condition or better in order to be deductible unless the item donated is worth more than \$500 and you have the item's value appraised. Attach a copy of the appraisal. Include any vehicles donated to charity.

TSJ	Organization or Description of Contribution	2021 Amount	2020 Amount

TSJ	Conservation Real Property	2021 Amount	2020 Amount
	100% limit		
	50% limit		

TSJ	Description	2021 Miles	2020 Miles
	Number of miles traveled performing volunteer work for qualified charitable organizations		

**Noncash Contributions Totaling \$500 or Less:** Include all documentation.

TSJ	Description of Donated Property	2021 Amount	2020 Amount

**Noncash Contributions Totaling More Than \$500:** Include all Forms 1098-C or other documentation.

TSJ	Property Description	Date Acquired	Date of Donation	Cost or Basis
A				
B				
C				

	Fair Market Value (FMV)	Method Used to Determine FMV	Other Method Description	Method of Acquisition
A				
B				
C				

1 - Appraisal    3 - Comparable Sale    5 - Thrift Shop Value  
 2 - Catalog    4 - Other (Describe)

1 - Gift    3 - Exchange  
 2 - Inheritance    4 - Purchase

	Donee Organization Name	Donee Organization Address
A		
B		
C		







2021

# Itemized Deductions - Business Use of Home

16A

**These expenses are not deductible on the Federal return but may be deductible on some state returns.**

### Partial Use of Your Home for Business:

Square footage of home used exclusively for business .....

Total square footage of home .....

Total hours home was used for day care during the year .....

2021	2020

Was your home used for day care purposes for the entire year? .....

Were improvements made to the home and/or home office since the time you began using the home for business? .....

Yes	No

### Expenses: Enter all expenses at 100 percent

Direct expenses benefit the business part of your home.  
 Example: Cost of painting or repairs made to the specific area or room used for business.

Indirect expenses are required for keeping up and running your entire home.  
 Example: Real estate taxes.

	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount
Casualty losses .....				
Deductible mortgage interest paid to:				
Financial institutions .....				
Individuals .....				
Real estate taxes .....				
Insurance .....				
Qualified mortgage insurance premiums .....				
Repairs and maintenance .....				
Utilities .....				
Rent .....				

### Other Expenses:

Description	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount

### Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	Address of Individual to Whom Mortgage Interest Was Paid



2021

# Employee Business Expenses (Page 1 of 2)

TS: \_\_\_\_\_ Occupation: \_\_\_\_\_

Business Expenses: Enter all expenses at 100 percent Include all documentation

Occupation code \_\_\_\_\_

- |                          |  |                         |
|--------------------------|--|-------------------------|
| 1 - Performing artist    | 3 - Fee-basis state or local government official | 5 - Outside salesperson |
| 2 - Handicapped employee | 4 - National Guard or Reserve                    | (Big Rapids, MI only)   |

If not 100%, enter the percentage to apply to Schedule A \_\_\_\_\_ %

	2021 Amount	2020 Amount
Parking fees and tolls .....		
Local transportation .....		
Travel expenses .....		
Meals .....		
Entertainment (deductible only on some state returns) .....		

Other Business Expenses:

Description	2021 Amount	2020 Amount

Reimbursements: List only reimbursements NOT reported in Box 1 of your Form W-2

	2021 Amount	2020 Amount
Amount received for other expenses .....		
Amount received for meals .....		
Amount received for entertainment .....		

Does your employer's reimbursement plan for meals and entertainment allow for offset of other reimbursements? .....  Yes  No





2021

# Employee Business Expenses- Business Use of Home

17B

### Partial Use of Your Home for Business:

Square footage of home used exclusively for business .....

Total square footage of home .....

Total hours home was used for day care during the year .....

2021	2020

Was your home used for day care purposes for the entire year? .....

Were improvements made to the home and/or home office since the time you began using the home for business? .....

Yes	No

### Expenses: Enter all expenses at 100 percent

Direct expenses benefit the business part of your home.  
Example: Cost of painting or repairs made to the specific area or room used for business.

Indirect expenses are required for keeping up and running your entire home.  
Example: Real estate taxes.

	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount
Casualty losses .....				
Deductible mortgage interest paid to:				
Financial institutions .....				
Individuals .....				
Real estate taxes .....				
Insurance .....				
Qualified mortgage insurance premiums .....				
Repairs and maintenance .....				
Utilities .....				
Rent .....				

### Other Expenses:

Description	Direct Expenses		Indirect Expenses	
	2021 Amount	2020 Amount	2021 Amount	2020 Amount

### Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	Address of Individual to Whom Mortgage Interest Was Paid



# Child/Dependent Care Expenses & Education Expenses

## Child/Dependent Care Expenses:

### General Information:

TSJ .....

Were you or your spouse a full time student or disabled?  Yes  No

Did you pay an individual for services performed in your home?  Yes  No

Expenses incurred in 2020 but paid in 2021 .....

Employer-provided dependent care benefits that were forfeited in 2021 .....

2020 carryover used in grace period .....

### Child/Dependent Care Providers:

#### Provider 1:

Name .....  
Street address .....  
City, state, ZIP or postal code, and country .....  
Social security number OR .....  
Employer identification number .....  
Telephone number (California only) .....

2021 Amount	2020 Amount
Expenses incurred and paid in 2021 .....	
Expenses incurred and not paid in 2021 .....	

#### Provider 2:

Name .....  
Street address .....  
City, state, ZIP or postal code, and country .....  
Social security number OR .....  
Employer identification number .....  
Telephone number (California only) .....

2021 Amount	2020 Amount
Expenses incurred and paid in 2021 .....	
Expenses incurred and not paid in 2021 .....	

### Qualifying Persons for Child/Dependent Care Expenses:

First Name and Initial	Last Name	Social Security Number	2021 Expenses Incurred	2020 Expenses Incurred

### Higher Education Expenses for Education Credits and/or Tuition Fees Deduction:

Qualified expenses are for post-secondary education tuition and related expenses; they do not include room or board. Include a detailed listing of the expenses.

**Include copies of all Forms 1098-T**

First Name and Initial	Last Name	Social Security Number	2021 Qualified Expenses



**General Information:**

TSJ .....

Employer identification number .....

Did you pay any one household employee cash wages of \$2,300 or more in 2021?  Yes  No

Did you withhold any federal income tax from wages paid to any household employee?  Yes  No

Did you pay total cash wages of \$1,000 or more in any calendar quarter of 2020 or 2021?  Yes  No

**Social Security, Medicare and Income Taxes:**

	2021 Amount	2020 Amount
Cash wages subject to social security taxes .....		
Cash wages subject to Medicare taxes (if different than cash wages subject to social security)		
Cash wages subject to additional Medicare tax withholding .....		
Federal income tax withheld .....		
State disability plan payments subject to social security taxes .....		
State disability plan payments subject to Medicare taxes (if different than plan payments subject to social security) .....		

**Federal Unemployment (FUTA) Tax:**

Did you pay unemployment contributions to more than one state?  Yes  No

Were all of the wages subject to FUTA tax subject to the state's unemployment tax?  Yes  No

State	Total Cash Wages Subject to FUTA	2020 Amount

Complete the following for all state unemployment contributions made:

X if payment to be made after April 18, 2022

Name of State	Total Taxable Wages	Contribution Paid to Unemployment Fund	X	2020 Amount



2021

# Federal Tax Payments

## Refund Application:

If you have an overpayment of 2021 taxes, do you want the excess:

Refunded .....  Yes  No  
 Applied to your 2022 estimated tax liability  Yes  No

## Federal Estimated Tax Payments:

2021 1st Quarter Estimate ..... (Due 04-15-2021)  
 2021 2nd Quarter Estimate ..... (Due 06-15-2021)  
 2021 3rd Quarter Estimate ..... (Due 09-15-2021)  
 2021 4th Quarter Estimate ..... (Due 01-18-2022)

Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid

2020 overpayment applied to 2021 estimate .....

## Tax Planning Information for Tax Year 2022:

Do you expect any of the following to occur in 2022?

	Yes	No
A change in your marital status .....	<input type="checkbox"/>	<input type="checkbox"/>
A change in the number of your dependents .....	<input type="checkbox"/>	<input type="checkbox"/>
A substantial change in your income .....	<input type="checkbox"/>	<input type="checkbox"/>
A substantial change in your withholding .....	<input type="checkbox"/>	<input type="checkbox"/>
A substantial change in deductions .....	<input type="checkbox"/>	<input type="checkbox"/>

If you answered Yes to any of the above questions, provide details.






2021

# State and City Tax Payments

20A

## State and City Estimated Tax Payments:

TSJ _____		
State/City _____		
Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid

2021 1st Quarter Estimate .....

2021 2nd Quarter Estimate .....

2021 3rd Quarter Estimate .....

2021 4th Quarter Estimate .....

If you have an overpayment of 2021 taxes, do you  
 want the excess applied to your 2022 estimated tax liability? .....  Yes  No

2020 overpayment applied to 2021 estimate .....

Balance of prior year(s)' tax paid in 2021 plus  
 amount paid with 2020 extensions .....

Estimated tax payments for 2020 paid in 2021 .....

## State and City Estimated Tax Payments:

TSJ _____		
State/City _____		
Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid

2021 1st Quarter Estimate .....

2021 2nd Quarter Estimate .....

2021 3rd Quarter Estimate .....

2021 4th Quarter Estimate .....

If you have an overpayment of 2021 taxes, do you  
 want the excess applied to your 2022 estimated tax liability? .....  Yes  No

2020 overpayment applied to 2021 estimate .....

Balance of prior year(s)' tax paid in 2021 plus  
 amount paid with 2020 extensions .....

Estimated tax payments for 2020 paid in 2021 .....

## State and City Estimated Tax Payments:

TSJ _____		
State/City _____		
Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid

2021 1st Quarter Estimate .....

2021 2nd Quarter Estimate .....

2021 3rd Quarter Estimate .....

2021 4th Quarter Estimate .....

If you have an overpayment of 2021 taxes, do you  
 want the excess applied to your 2022 estimated tax liability? .....  Yes  No

2020 overpayment applied to 2021 estimate .....

Balance of prior year(s)' tax paid in 2021 plus  
 amount paid with 2020 extensions .....

Estimated tax payments for 2020 paid in 2021 .....





# Foreign Employment Information (Page 1 of 3)

### General Information:

TS ..... \_\_\_\_\_

Foreign address ..... \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Name of employer ..... \_\_\_\_\_  
 Employer's U.S. address ..... \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Employer's foreign address ..... \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Employer type: Foreign entity, U.S. company,  
 Foreign affiliate of a U.S. company, Self ..... \_\_\_\_\_

Enter the last year that Form 2555 was filed to  
 claim either of the exclusions ..... \_\_\_\_\_

Type of exclusions revoked in prior years ..... \_\_\_\_\_

Year exclusion revoked ..... \_\_\_\_\_

If a separate foreign residence was maintained for your  
 family due to adverse living conditions, please provide  
 the city, country, and number of days maintained ..... \_\_\_\_\_

List tax home(s) during tax year and dates established ..... \_\_\_\_\_

Country of citizenry or nationality ..... \_\_\_\_\_

Qualified housing expenses for the tax year .....

Adjustment to employer provided amounts for qualified  
 housing expense .....

### Tax Home History:

	Principal City and Country of Employment	Start Date (Mo/Da/Yr)	End Date (Mo/Da/Yr)
Most recent tax home .....			
First previous tax home .....			
Second previous tax home .....			
Third previous tax home .....			



# Foreign Employment Information (Page 2 of 3)

### Bona Fide Residence Test Information:

Beginning date for foreign residence ..... (Mo/Da/Yr) \_\_\_\_\_  
 Ending date for foreign residence ..... (Mo/Da/Yr) \_\_\_\_\_

Kind of foreign living quarters:  
 Purchased house, Rented house or apartment, Rented room,  
 Quarters furnished by employer .....

If any family members lived abroad with you during any part  
 of the tax year, enter their names. Include the dates when  
 the family members lived with you

Relationship	First Name	MI	Last Name	Date Arrived	Date Left	X if Entire Period

Was a statement made to foreign country authorities declaring you were not a resident of their country? .....	Yes	No
Were you required to pay income tax in that country? .....		
Does the foreign country have an income tax? .....		

State any contractual terms or other conditions relating to the length of employment abroad .....

What type of visa was used to enter the foreign country? .....

Explain any limitations of the visa as to length of stay or employment in a foreign country .....

If a home was maintained in U.S. while residing abroad, show address, whether rented, names and relationships of occupants

Address

Street address .....

City .....

State .....

ZIP Code .....

X if rented .....

Occupants			
First Name	MI	Last Name	Relationship





2021

# Foreign Housing Expenses Worksheet

30C

Indicate below (for yourself, spouse and dependents living with you) the amount of housing expenses incurred (whether paid by you or your employer) in the foreign country. If expenses are listed in foreign currency, indicate dates of payment to the left of the amount boxes and enter type of currency.

Type of currency . . . . .	Amount Reimbursed to You or Paid on Your Behalf by Employer	Amount Paid by You Which is NOT Reimbursable by Your Employer	Total Expenses
Rent . . . . .			
Fair market value of employer-owned housing furnished to you (Without reduction for U.S. equivalent housing charge) . . . . .			
Foreign real estate, occupancy taxes or television taxes (not included on Medical Expenses and Taxes form, detail by country on continuation sheet) . . . . .			
Utilities (but not telephone charges) . . . . .			
Real and personal property insurance . . . . .			
"Key money" or other similar nonrefundable deposits paid to secure a lease . . . . .			
Repairs and maintenance . . . . .			
Furniture rental . . . . .			
Lodging portion of temporary living expenses (Do not include on Moving Expenses page) . . . . .			

Other Expenses:

Description	Amount Reimbursed to You or Paid on Your Behalf by Employer	Amount Paid by You Which is NOT Reimbursable by Your Employer	Total Expenses

Total expenses . . . . . 

--	--	--

Indicate if meals and/or lodging were provided by or on behalf of your employer on his business premises: (If you resided in a camp, you are considered to be on the business premises of your employer.)

To you . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
To your family members . . . . .	<input type="checkbox"/>	<input type="checkbox"/>



2021

# Foreign Travel and Workdays Information Worksheet

30D

Complete for every month even if this may have been your first or last year in the U.S.

Travel To/From the U.S.				Days in Month	Days Worked In and Outside U.S.				
Dates (Mo/Da/Yr)		Dates (Mo/Da/Yr)			Days Not Worked*		Days Worked**		
Left Foreign Country	Arrived U.S.	Left U.S.	Arrived Foreign Country		U.S.	Foreign	U.S.	Foreign	
				January	31				
				February	28				
				March	31				
				April	30				
				May	31				
				June	30				
				July	31				
				August	31				
				September	30				
				October	31				
				November	30				
				December	31				
				Total	365				

\* Weekends, holidays, vacation, sick, etc.

\*\* Include weekends and holidays if you worked on these days.

During 2021, in which state(s)/city(ies) did you work?

List the dates

State/City	From (Mo/Da/Yr)	To (Mo/Da/Yr)	Days Worked

Total (must agree with U.S. days worked shown above)

Days in U.S. for any reason in ..... 2020 \_\_\_\_ 2019 \_\_\_\_



2021

# Foreign Wages and Other Income (Page 1 of 2)

### Foreign Questions for 2021:

If you will be outside the U.S., do you want an automatic extension if you qualify? .....

Will any tax due be paid with the extension? .....

If you were working outside the U.S., did you terminate your foreign employment in 2021? .....

Did you have foreign income derived from sources within designated "Boycott Activities"? .....

If Yes, provide all information pertaining to the boycott activities.

Yes	No

### Foreign Source Wages and Salaries:

**Include all copies of your current year Forms W-2 or other wage statements**

TS \_\_\_\_\_ Employer name .....

Employer address .....

Employer city .....

Employer state .....

Employer ZIP .....

Employer foreign country .....

	2021 Amount	2020 Amount
Base wages .....		
Federal tax withheld .....		
FICA withheld .....		
Medicare tax withheld .....		
Days in foreign country before foreign assignment .....		
Days in foreign country after foreign assignment .....		
Days in U.S. while on foreign assignment .....		

### Allowances and Reimbursements:

	2021 Amount	2020 Amount
Cost of living and overseas differential .....		
Moving expense reimbursement .....		
Family .....		
Education .....		
Home leave .....		
Quarters .....		
Bonus .....		
Stock option - current year .....		
Foreign tax reimbursement .....		
Survivor's insurance .....		
Automobile .....		
Hardship premium .....		
Home gross salary .....		
Tax adjustment - current year .....		
Gross up .....		
Mobility premium .....		
Relocation allocation .....		
Wire transfer allowance .....		
Home housing allowance .....		
Home gross entitlement .....		
Home net entitlement .....		
Variable pay awards .....		
Miscellaneous .....		
Imputed tax preparation fees .....		
Home country pension cost .....		
401(k) reductions .....		











2020

JANUARY							FEBRUARY							MARCH							APRIL						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4							1	1	2	3	4	5	6	7				1	2	3	4
5	6	7	8	9	10	11	2	3	4	5	6	7	8	8	9	10	11	12	13	14	5	6	7	8	9	10	11
12	13	14	15	16	17	18	9	10	11	12	13	14	15	15	16	17	18	19	20	21	12	13	14	15	16	17	18
19	20	21	22	23	24	25	16	17	18	19	20	21	22	22	23	24	25	26	27	28	19	20	21	22	23	24	25
26	27	28	29	30	31		23	24	25	26	27	28	29	29	30	31					26	27	28	29	30		

  

MAY							JUNE							JULY							AUGUST						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4							1
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	7	8
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18	9	10	11	12	13	14	15
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	23	24	25	26	27	28	29	
31														30	31					30	31						

  

SEPTEMBER							OCTOBER							NOVEMBER							DECEMBER								
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S		
			1	2	3	4	5					1	2	3	1	2	3	4	5	6	7				1	2	3	4	5
6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14	6	7	8	9	10	11	12		
13	14	15	16	17	18	19	11	12	13	14	15	16	17	15	16	17	18	19	20	21	13	14	15	16	17	18	19		
20	21	22	23	24	25	26	18	19	20	21	22	23	24	22	23	24	25	26	27	28	20	21	22	23	24	25	26		
27	28	29	30				25	26	27	28	29	30	31	29	30					27	28	29	30	31					

2021

JANUARY							FEBRUARY							MARCH							APRIL								
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S		
					1	2		1	2	3	4	5	6				1	2	3	4	5	6					1	2	3
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13	4	5	6	7	8	9	10		
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20	11	12	13	14	15	16	17		
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27	18	19	20	21	22	23	24		
24	25	26	27	28	29	30	28							28	29	30	31				25	26	27	28	29	30			
31																													

  

MAY							JUNE							JULY							AUGUST						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1			1	2	3	4	5					1	2	3	1	2	3	4	5	6	7
2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14
9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17	15	16	17	18	19	20	21
16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24	22	23	24	25	26	27	28
23	24	25	26	27	28	29	27	28	29	30				25	26	27	28	29	30	31	29	30	31				
30	31																										

  

SEPTEMBER							OCTOBER							NOVEMBER							DECEMBER								
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S		
			1	2	3	4					1	2				1	2	3	4	5	6					1	2	3	4
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11		
12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18		
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25		
26	27	28	29	30			24	25	26	27	28	29	30	28	29	30				26	27	28	29	30	31				
							31																						

2022

JANUARY							FEBRUARY							MARCH							APRIL									
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S			
						1				1	2	3	4	5				1	2	3	4	5							1	2
2	3	4	5	6	7	8	6	7	8	9	10	11	12	6	7	8	9	10	11	12	3	4	5	6	7	8	9			
9	10	11	12	13	14	15	13	14	15	16	17	18	19	13	14	15	16	17	18	19	10	11	12	13	14	15	16			
16	17	18	19	20	21	22	20	21	22	23	24	25	26	20	21	22	23	24	25	26	17	18	19	20	21	22	23			
23	24	25	26	27	28	29	27	28						27	28	29	30	31	24	25	26	27	28	29	30					
30	31																													

  

MAY							JUNE							JULY							AUGUST						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1				1	2	3	4						1	2	1	2	3	4	5	6	7
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27
29	30	31					26	27	28	29	30			24	25	26	27	28	29	30	28	29	30	31			
														31													

  

SEPTEMBER							OCTOBER							NOVEMBER							DECEMBER									
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S			
					1	2	3						1				1	2	3	4	5							1	2	3
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10			
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17			
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24			
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			25	26	27	28	29	30	31				
							30	31																						



# Gifts Made Outright to an Individual

**NOTE: Only complete Forms 34 and/or 35 if in 2021:**

- You made gifts of cash or marketable securities to an individual that exceeded \$15,000; or
- You made gifts of hard-to-value assets (such as closely-held stock) to an individual of any amount; or
- You made any transfers to a trust (including paying premiums on a life insurance policy that was transferred to a life insurance trust).

You should include all gifts made to each individual during the year, including gifts for his or her birthday, holiday, anniversary, graduation, etc. In addition, include any gifts you made for educational or medical expenses. You can exclude amounts paid directly to a qualifying educational organization for tuition. You can also exclude amounts paid directly to health care providers if the expenses relate to nonelective medical expenses.

If you made any loans with an interest rate below the market rate of interest, provide details below.

If your most recent gift tax return was not prepared by us, include a copy.

For gifts other than cash, include a copy of any appraisal(s) of assets.

If no appraisal is available, describe how the value was determined.

For each gift made outright to an individual during the year, provide the following information:

### Gift 1:

Person giving the gift .....	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse	<input type="checkbox"/> Joint
Name of person receiving the gift .....	_____		
Address of person .....	_____		
Your relationship to the person (e.g., son, granddaughter or friend) .....	_____		
Age of the person .....	_____		
Date(s) of gift(s) .....	(Mo/Da/Yr) _____		
Description and amount of assets gifted (e.g., \$15,000 in cash or 500 shares of ABC stock) .....	_____		
Cost basis of assets gifted if other than cash .....	<input type="text"/>		
Value of assets gifted if other than cash .....	<input type="text"/>		

### Gift 2:

Person giving the gift .....	<input type="checkbox"/> Taxpayer	<input type="checkbox"/> Spouse	<input type="checkbox"/> Joint
Name of person receiving the gift .....	_____		
Address of person .....	_____		
Your relationship to the person (e.g., son, granddaughter or friend) .....	_____		
Age of the person .....	_____		
Date(s) of gift(s) .....	(Mo/Da/Yr) _____		
Description and amount of assets gifted (e.g., \$15,000 in cash or 500 shares of ABC stock) .....	_____		
Cost basis of assets gifted if other than cash .....	<input type="text"/>		
Value of assets gifted if other than cash .....	<input type="text"/>		



**NOTE: Complete this form only if you have made gifts in or to a trust during the year.**

**For each gift made in trust during the year, provide the following information:**

Name of trust receiving the gift . . . . . \_\_\_\_\_

Name of the trustee . . . . . \_\_\_\_\_

Address of the trustee . . . . . \_\_\_\_\_

Trust identification number . . . . . \_\_\_\_\_

Name of the beneficiary of the trust . . . . . \_\_\_\_\_

Your relationship to the beneficiary  
(e.g., son, granddaughter or friend) . . . . . \_\_\_\_\_

Age of the beneficiary . . . . . \_\_\_\_\_

Date(s) of gift(s) . . . . . (Mo/Da/Yr) \_\_\_\_\_

Description and amount of assets gifted  
(e.g., \$15,000 in cash or 500 shares of ABC stock) . . . . . \_\_\_\_\_

Cost basis of assets gifted if other than cash . . . . .

Value of assets gifted if other than cash . . . . .

For gifts other than cash, include a copy of any appraisal(s) of assets. If no appraisal is available, describe how the value was determined.

\_\_\_\_\_

**Include a copy of the following:**

**A copy of the trust document(s) unless previously furnished to us.**

**A copy of the letter(s) notifying the beneficiary of his or her right to withdraw, if the trust grants the beneficiary the right to withdraw amounts contributed to the trust.**









2021

# 2021 Tax Return Checklist

Client Name: .....

	Prior Year	Current Year
<b>Income:</b>		
Wages (IRS W-2) .....	_____	_____
Interest Income (IRS 1099-INT) .....	_____	_____
Dividend Income (IRS 1099-DIV) .....	_____	_____
Brokerage Statements (Form 1099-A,B,S) .....	_____	_____
IRA/Pension/Annuity Income (IRS 1099R) .....	_____	_____
Schedule K-1s (IRS K-1) .....	_____	_____
Miscellaneous Income and Adjustments (IRS-1099-MISC, NEC, G) .....	_____	_____
Rent and Royalty Income .....	_____	_____
<b>Itemized Deductions:</b>		
Medical/Dental Expenses .....	_____	_____
Real Estate Taxes .....	_____	_____
Property Taxes .....	_____	_____
Mortgage Interest (Form 1098) .....	_____	_____
Charitable Contributions .....	_____	_____
<b>Other:</b>		
Estimated Tax Payments .....	_____	_____

\* Provide any tax related information not listed above, e.g. new brokerage statements, K-1 investments, etc.





















2021

# Itemized Deductions

TSJ	Description	Prior Year Amount	Information Included (X or ✓)
-----	-------------	-------------------	-------------------------------

### Medical/Dental Expenses:


### Real Estate Taxes:


### Property Taxes:


### Mortgage Interest:


### Charitable Contributions:




2021

# Federal, State, and City Tax Payments

## Refund Application:

If you have an overpayment of taxes, do you want the excess:

Refunded .....  Yes  No  
 Applied to next year's estimated tax liability  Yes  No

## Federal Estimated Tax Payments:

2021 1st Quarter Estimate ..... (Due 04-15-2021)  
 2021 2nd Quarter Estimate ..... (Due 06-15-2021)  
 2021 3rd Quarter Estimate ..... (Due 09-15-2021)  
 2021 4th Quarter Estimate ..... (Due 01-18-2022)

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid

## State and City Estimated Tax Payments:

2021 1st Quarter Estimate .....  
 2021 2nd Quarter Estimate .....  
 2021 3rd Quarter Estimate .....  
 2021 4th Quarter Estimate .....

TSJ \_\_\_\_\_  
 State/City Name \_\_\_\_\_

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid

2021 1st Quarter Estimate .....  
 2021 2nd Quarter Estimate .....  
 2021 3rd Quarter Estimate .....  
 2021 4th Quarter Estimate .....

TSJ \_\_\_\_\_  
 State/City Name \_\_\_\_\_

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid

2021 1st Quarter Estimate .....  
 2021 2nd Quarter Estimate .....  
 2021 3rd Quarter Estimate .....  
 2021 4th Quarter Estimate .....

TSJ \_\_\_\_\_  
 State/City Name \_\_\_\_\_

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid

2021 1st Quarter Estimate .....  
 2021 2nd Quarter Estimate .....  
 2021 3rd Quarter Estimate .....  
 2021 4th Quarter Estimate .....

TSJ \_\_\_\_\_  
 State/City Name \_\_\_\_\_

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid



2021

General Information:

Name and address of present employer:

Taxpayer: Name, Address, City, State, ZIP Code, Foreign Province/State/County, Foreign Country, Foreign Postal Code

Spouse: Name, Address, City, State, ZIP Code, Foreign Province/State/County, Foreign Country, Foreign Postal Code

Residency Information:

From (Mo/Da/Yr) To (Mo/Da/Yr)

If you did not live in Alabama for all of 2021, enter the dates you did live in Alabama
Enter the state names other than Alabama for which you had income

Education Savings:

Did you or your spouse make any contributions to an Alabama Prepaid Affordable College Tuition Program or Alabama College Education Savings Program account? Yes No

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Consumer Use Tax:

Enter the amount of Internet or out of state purchases for which you did not pay sales tax: General use, Automotive vehicles, Farm machinery and equipment

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Senior Services Trust Fund, Alabama Arts Development Fund, Alabama Nongame Wildlife Fund, Child Abuse Trust Fund, Alabama Veteran's Program, Alabama State Historic Preservation Fund, Alabama Firefighters Annuity and Benefit Fund, Cancer Research Institute, USS Alabama Battleship Commission

Alabama State Veterans Cemetery at Spanish Fort Foundation, Inc., Foster Care Trust Fund, Mental Health, Alabama Breast & Cervical Cancer Program, Victims of Violence Assistance, Alabama Military Support Foundation, Alabama Veterinary Medical Foundation, Spay-Neuter Program, Alabama Association of Rescue Squads, Children First Trust Fund

Alabama Election Campaign Fund Contribution - Democratic Party, - Republican Party



2021

Enter Any Additional Alabama Information:

A large rectangular area with horizontal lines, intended for entering additional information.



2021

## Arizona Information

**Residency Information:**

From (Mo/Da/Yr)
--------------------

To (Mo/Da/Yr)
------------------

If you did not live in Arizona for all of 2021, enter the dates you did live in Arizona .....

Enter the state names other than Arizona where you had income .....

**Education Savings:**

Yes
-----

No
----

Did you or your spouse make any contributions to a qualified state tuition (Section 529) plan? .....

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

**Voluntary Contributions:**

Enter the amount you wish to contribute on your 2021 tax return to:

Sustainable State Parks and Road Fund	
Wildlife Fund	
Child Abuse Prevention Fund	
Domestic Violence Shelter Fund	
Neighbors Helping Neighbors Fund	
Special Olympics Fund	
Veteran’s Donation Fund	
I Didn’t Pay Enough Fund	
Solutions Teams Assigned to Schools	
Spay/Neuter of Animals Fund	
Political Gift - Democratic	
Libertarian	
Republican	
Green	

**Enter Any Additional Arizona Information:**




2021

# Arkansas Information

## General Information:

Number of developmentally disabled individuals .....

Names of developmentally disabled individuals .....

Type of disability .....

Taxpayer		Spouse	
Yes	No	Yes	No

Yes	No	Yes	No
-----	----	-----	----

Do you qualify as being deaf for personal credit purposes? .....

Early Childhood Program certification number .....

## Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in Arkansas for all of 2021, enter the dates you did live in Arkansas .....

Enter the state names other than Arkansas where you had income .....

## Education Savings:

Did you or your spouse make any contributions to an Arkansas Tax Deferred Tuition Savings Program account? .....

Yes	No
-----	----

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

## Check-Off Contribution:

Enter the amount you wish to contribute on your 2021 tax return to:

Arkansas Disaster Relief Fund .....	
Arkansas Game and Fish Foundation .....	
Arkansas School for the Blind and Deaf .....	
Baby Sharon's Children Catastrophic Illness Grant Program Trust Fund .....	
Organ Donor Awareness Education Program .....	
Military Family Relief Program .....	
Arkansas Area Agencies on Aging .....	
Newborn Umbilical Cord Initiative .....	
Arkansas Tax Deferred Tuition Savings Program .....	

## Enter Any Additional Arkansas Information:




2021

General Information:

Enter the amount of Internet or out of state purchases for which you did not pay sales tax

Did you, your spouse, and all household members have full-year health care coverage? Attach all Forms FTB 3895 and/or IRS 1095 received and any applicable exemption information.

Principal/Physical Residence if Different from Mailing Address: California Residents Only

Street address, Apt No., City, State, ZIP, County at time of filing, Country, province, and postal code (if foreign)

Residency Information:

Table with columns for Taxpayer and Spouse, containing residency questions and Yes/No checkboxes.

Voluntary Contributions: Enter the amount you wish to contribute on your 2021 tax return to the following funds:

Table listing various voluntary contribution funds such as California Seniors Special Fund, Alzheimer's Disease and Related Dementia Voluntary Tax Contribution Fund, etc.







2021

General Information:

Enter the amount of Internet or out of state purchases for which you did not pay state sales or use tax

If you live in a special use tax district, enter the name of the district

Enter the amount of Internet or out of state purchases for which you did not pay special district sales or use tax

Residency Information:

Taxpayer		Spouse	
From (Mo/Da/Yr)	To (Mo/Da/Yr)	From (Mo/Da/Yr)	To (Mo/Da/Yr)

If you did not live in Colorado for all of 2021, enter the dates you did live in Colorado

Enter the state names other than Colorado where you had income

Education Savings:

Did you or your spouse make any contributions to a Colorado 529 College Savings Plan account?

Yes	No
-----	----

If Yes, enter the following:

TS	Account Holder Name	Account Holder Social Security Number	Account Number	2021 Amount Contributed

First-Time Home Buyer Savings Account Deduction:

Name of beneficiary

SSN of beneficiary

Name of bank or institution

Account number of the first-time home buyer account

Beginning of year balance in account

End of year balance in account





2021

General Information:

Enter the amount of Internet or out of state purchases for which you did not pay sales tax:

Combine individual purchases less than \$300 each per category and enter the total purchase amount.

Luxury items	
Computer and data processing services	
Vessels, motors for vessels, or trailers to transport vessels	
Other purchases	

For any amounts entered, include the date of purchase, description, purchase price, and tax paid.

Residency Information:

Taxpayer		Spouse	
From (Mo/Da/Yr)	To (Mo/Da/Yr)	From (Mo/Da/Yr)	To (Mo/Da/Yr)

If you did not live in Connecticut for all of 2021:

Enter the dates you did live in Connecticut

List the prior/new state of residence

Enter the state names other than Connecticut where you had income

Education Savings:

Yes	No
-----	----

Did you or your spouse make any contributions to a Connecticut Higher Education Trust (CHET) account?

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	CHET Account Number	2021 Amount Contributed

Nonresident and Part-Year Resident Employee Apportionment Worksheet Information:

If your employment required you to perform services both inside and outside Connecticut and you do not know the actual amount of income you earned in Connecticut and you were an employee who was compensated, complete the information below:

Basis for apportionment: Working days (1), Sales (2), Mileage (3)

Days/sales/miles outside Connecticut

Days/sales/miles inside Connecticut

Nonworking days (only to be used with working days basis for apportionment)

Total income being apportioned

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

AIDS Research Education Fund	
Organ Transplant Fund	
Endangered Species/Wildlife Fund	
Breast Cancer Research Fund	
Safety Net Services Fund	
Military Family Relief Fund	
Connecticut Higher Education Trust (CHET) Baby Scholar Fund	
Mental Health Community Investment Account	





2021

# Delaware Information

### General Information:

Taxpayer
----------

Spouse
--------

Business telephone number (including area code) \_\_\_\_\_

Do you qualify as permanently disabled?  Yes  No

Yes  No

### Residency Information:

Taxpayer	
From (Mo/Da/Yr)	To (Mo/Da/Yr)

Spouse	
From (Mo/Da/Yr)	To (Mo/Da/Yr)

If you did not live in Delaware for all of 2021, enter the dates you did live in Delaware \_\_\_\_\_

Enter the state names other than Delaware where you had income \_\_\_\_\_

### Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Taxpayer
----------

Spouse
--------

- Delaware's Nongame Wildlife, Endangered Species, and Natural Areas Preservation Fund .....
- Emergency Housing Assistance Fund .....
- Delaware Breast Cancer Coalition .....
- Organ Donation Awareness Trust Fund .....
- Diabetes Education Fund .....
- Delaware Veteran's Home Fund .....
- Delaware National Guard and Reserve Emergency Assistance Fund .....
- Juvenile Diabetes Research Foundation .....
- Multiple Sclerosis Society .....
- Ovarian Cancer Fund .....
- 21st Fund for Children .....
- White Clay Creek Wild and Scenic River Preservation Fund .....
- Home of the Brave Fund .....
- Senior Trust Fund .....
- Veteran's Trust Fund .....
- Protecting DE's Children Fund .....
- Food Bank of Delaware .....
- Delaware Habitat for Humanity .....
- B+ Childhood Cancer Foundation .....
- Beau Biden Fund .....



### Enter Any Additional Delaware Information:




2021

Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in the District of Columbia for all of 2021, enter the dates you did live in the District of Columbia .....

Enter the state names other than the District of Columbia where you had income .....

Education Savings:

Yes	No
-----	----

Did you or your spouse make any contributions to a qualified DC "529" College Savings Plan account? .....

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

Property Tax Credit Information:

TS .....

Enter the amount of rent paid .....

What type of property is the property tax credit for? .....

Landlord's information:

Name .....  
Address .....  
Apartment number .....  
City, state and ZIP code .....  
Telephone number .....

Business Credits

Organ and Bone Marrow Donor Credit .....

Job Growth Incentive Act Credit .....

Amount of homeownership assistance provided to eligible employees .....

Number of eligible employees .....

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Tax-Payer Support for Afterschool Programs for At-Risk Students .....

DC Statehood Delegation Fund .....

Anacostia River Cleanup and Protection Fund .....



2021

Disability Income Exclusion Information:

Were you physically or mentally impaired on January 1, 2021?
Is your disability expected to last 12 months or more?
Did you file a physician's certification in prior years?

Yes No grid for disability questions

TS form with fields for Date retired, Name of employer, Name of payer, Physician's name, Physician's address, Physician's apartment number, Physician's city, state and ZIP code, Physician's telephone number

Non-Custodial Parent EITC Claim Information:

Dependent name
Dependent SSN
Location of court
Case or Docket number
Name of government agency
Street address of government agency
City, state and ZIP code
Monthly court ordered payments
Start date of ordered payments (Mo/Da/Yr)

Form for Non-Custodial Parent EITC Claim Information

Custodian first name and initial
Custodian last name
Custodian social security number
Custodian street address
City, state and ZIP code
Custodian date of birth (Mo/Da/Year)

Form for Custodian information

Health Insurance Information

Did you and all household members have health insurance coverage for the entire year?
If No, did you or any household members qualify for an exemption?
If Yes, enter the applicable exemption.
If No, indicate which months you and/or your household members did not have health insurance coverage and did not have an exemption.

Yes No grid for health insurance questions

Table with columns: Household Member Names, Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec

Enter Any Additional District of Columbia Information:

Additional information input field







2021

Unincorporated Business Franchise Tax Information:

General Information:

TSJ \_\_\_\_\_

Number of business locations: \_\_\_\_\_

    Within DC \_\_\_\_\_

    Outside DC \_\_\_\_\_

DC business tax number \_\_\_\_\_

Sales and use tax account number \_\_\_\_\_

Federal employer I.D. number \_\_\_\_\_

Fiscal year begin date \_\_\_\_\_

Fiscal year end date \_\_\_\_\_

Business name \_\_\_\_\_

Business street address \_\_\_\_\_

Business city, state, and ZIP code \_\_\_\_\_

Supplemental Information:

Principal business activity \_\_\_\_\_

Type of ownership \_\_\_\_\_

Date business began (Mo/Da/Yr) \_\_\_\_\_

Was the business terminated during 2021?  Yes  No

    If Yes, enter the termination date and reason below.

    Termination date (Mo/Da/Yr) \_\_\_\_\_

    Termination reason \_\_\_\_\_

IRS Service Center where the 2021 federal income tax return was filed \_\_\_\_\_

Taxpayer name shown on the 2021 federal income tax return filed \_\_\_\_\_

Have you filed annual Federal Information Return Forms 1096 and 1099?  Yes  No

    If No, enter the reason for not filing Forms 1096 and 1099 \_\_\_\_\_

Which method is used on the federal income tax return? Accrual  Cash  Other (specify) \_\_\_\_\_

Did you withhold DC income tax from your employees' wages during 2021?  Yes  No

    If No, enter the reason for not withholding DC income tax \_\_\_\_\_

Did you file a DC franchise tax return for the business for 2020?  Yes  No

    If No, enter the reason for not filing a DC franchise tax return \_\_\_\_\_

Did you file an annual ballpark fee return?  Yes  No

Has the IRS made or proposed any adjustments to your 2021 income tax return, or did you file any amended federal income tax returns?  Yes  No







2021

# Georgia Information

## General Information:

Taxpayer Disability Information:

Type .....

Date ..... (Mo/Da/Yr)

Spouse Disability Information:

Type .....

Date ..... (Mo/Da/Yr)

## Residency Information:

From (Mo/Da/Yr)

To (Mo/Da/Yr)

If you did not live in Georgia for all of 2021, enter the dates you did live in Georgia .....

## Education Savings:

Yes

No

Did you or your spouse make any contributions to a Georgia Path2College 529 Plan account? .....

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

## Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Wildlife Conservation Fund .....

Fund for Children and Elderly .....

Cancer Research Fund .....

Land Conservation Program .....

National Guard Foundation .....

Dog and Cat Sterilization Fund .....

Saving the Cure Fund .....

Realizing Educational Achievement Can Happen .....

Public Safety Memorial Grant .....


## Enter Any Additional Georgia Information:




2021

# Hawaii Information

## General Information:

County of residence .....

Jury duty pay returned to employer .....

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you qualify as deaf or disabled? .....

## Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in Hawaii for all of 2021, enter the dates you did live in Hawaii .....

Enter the state names other than Hawaii where you had income .....

## Voluntary Contributions:

Do you wish to contribute \$3 to the Hawaii Election Campaign Fund? This will not increase your balance due or decrease your refund .....

Do you wish to contribute \$2 to the Hawaii school-level minor repairs and maintenance special fund? .....

Do you wish to contribute \$2 to the Hawaii Public Libraries Fund? .....

Do you wish to contribute \$5 to the Hawaii Domestic Violence/Child Abuse and Neglect Funds? .....

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Low-Income Household Renters:

Address .....

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

Dates occupied .....

Owner's name .....

Owner's address .....

Owner's tax ID number .....

Enter total rent paid .....

## Enter Any Additional Hawaii Information:




2021

# Idaho Information

### General Information:

	Taxpayer		Spouse	
	Yes	No	Yes	No
Are you disabled and age 62, 63 or 64? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you the unremarried widow of a retired U.S. Civil Service employee, U.S. Military Serviceman, Idaho fireman or Idaho policeman? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enter the amount of Internet or out of state purchases for which you did not pay sales tax ..	<input type="text"/>		<input type="text"/>	

### Residency Information:

	Taxpayer		Spouse	
	From (Mo/Da/Yr)	To (Mo/Da/Yr)	From (Mo/Da/Yr)	To (Mo/Da/Yr)
If you did not live in Idaho for all of 2021, enter the dates you did live in Idaho .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Enter the state names other than Idaho where you had income .....	<input type="text"/>		<input type="text"/>	

	Taxpayer		Spouse	
	Yes	No	Yes	No
Are you a resident on active military duty? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you a military nonresident? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Education Savings:

	Yes	No
Did you or your spouse make any contributions to a Idaho College Savings Program account? .....	<input type="checkbox"/>	<input type="checkbox"/>

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

### Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Nongame Wildlife Conservation Fund .....	<input type="text"/>
Idaho Guard and Reserve Family Support Fund .....	<input type="text"/>
Children's Trust Fund/Child Abuse Prevention .....	<input type="text"/>
Special Olympics Idaho .....	<input type="text"/>
Idaho Food Bank .....	<input type="text"/>
Veterans Support Fund .....	<input type="text"/>
Opportunity Scholarship Program .....	<input type="text"/>
American Red Cross of Idaho Fund .....	<input type="text"/>

### Enter Any Additional Idaho Information:




2021

General Information:

County of residence

Enter the total property tax paid applicable to the personal residence

Property index number

County name

Enter the amount of general merchandise for which you did not pay any sales tax

Enter the amount of qualifying food, non-prescription drugs and medical appliances for which you did not pay any sales tax

Are you a member, shareholder, partner, beneficiary, or owner of an LLC or other organization that holds a medical cannabis cultivation center or medical cannabis dispensary registration?

Do you or your spouse have income from the sale of assets owned by a gaming licensee?

Enter the amount of Illinois income tax you withheld from a household employee

Residency Information:

From (Mo/Da/Yr) To (Mo/Da/Yr)

If you did not live in Illinois for all of 2021, enter the dates you did live in Illinois

Enter the state names other than Illinois where you had income

Education Savings:

Did you or your spouse make any contributions to a Bright Start College Savings Program, Bright Directions College Savings Program, or College Illinois Prepaid Tuition Program?

If Yes, enter the following:

X if contribution was a gift

Table with 7 columns: TS, Name of Designated Beneficiary, Type of Plan, Social Security Number, Account Number, 2021 Amount Contributed, X

ABLE Savings Account:

Did you or your spouse make any contributions to a qualified Illinois ABLE savings account?

If Yes, enter the following:

X if contribution was a gift

Table with 7 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed, X

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to the following funds:

- Wildlife Preservation Fund
Alzheimer's Disease Research, Care, and Support Fund
Assistance to the Homeless Fund
Diabetes Research Fund
Hunger Relief Fund
Ronald McDonald House Charities Fund







2021

General Information:

Taxpayer	Spouse
----------	--------

County of residence .....

County of employment .....

Enter the amount of Internet or out of state purchases for which you did not pay sales tax .....

Residency Information:

Taxpayer		Spouse	
From (Mo/Da/Yr)	To (Mo/Da/Yr)	From (Mo/Da/Yr)	To (Mo/Da/Yr)

If you did not live in Indiana for all of 2021, enter the dates you did live in Indiana .....

Enter the state names other than Indiana where you had income .....

Education Savings:

Yes	No
-----	----

Did you or your spouse make any contributions to an Indiana CollegeChoice 529 Education Savings Plan? .....

If Yes and you made contributions for the purpose of paying for qualified higher education expenses, enter the following:

TS	Taxpayer or Spouse is not the Account Owner	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

If Yes and you made contributions for the purpose of paying for K-12 tuition expenses, enter the following:

TS	Taxpayer or Spouse is not the Account Owner	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Nongame Wildlife Fund .....	
Public K-12 Education Fund .....	
Military Family Relief Fund .....	

Deductions and Credits:

Taxpayer	Spouse

Enter the amount of Indiana lottery winnings .....

If you made a contribution during 2021 to an Indiana college or university, enter the following information:

Name of College or University	Date	Amount





2021

General Information:

County of residence .....

School district number .....

Has your name or address changed since filing last year's return?  Yes  No

Taxpayer

Spouse

Tuition and textbook expenses for Grades K-12 .....

Residency Information:

Taxpayer	
From (Mo/Da/Yr)	To (Mo/Da/Yr)

Spouse	
From (Mo/Da/Yr)	To (Mo/Da/Yr)

If you did not live in Iowa for all of 2021, enter the dates

you did live in Iowa .....

Enter the state names other than Iowa where you had income .....

Education Savings:

Did you or your spouse make any contributions to a College Savings Iowa or Iowa Advisor 529 Plan account?  Yes  No

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Fish and Game Protection Fund .....	
Iowa State Fair Foundation .....	
Child Abuse Prevention Program Fund .....	
Veterans Trust Fund/Volunteer Fire Fighter Preparedness Fund .....	

Iowa Itemized Deductions:

Taxpayer

Spouse

Enter the amount of expenses incurred for the care of a disabled relative .....

Enter any adoption expenses .....



2021

**Federal Tax Data:**

Iowa deduction for federal taxes .....	<input type="text"/>	
Federal tax liability .....	<input type="text"/>	
Total federal other taxes .....	<input type="text"/>	
Federal estimated tax paid in 2020 .....	<input type="text"/>	
Federal estimated tax applied from 2019 overpayment .....	<input type="text"/>	
Federal estimated tax paid in 2021 .....	<input type="text"/>	
Amount paid with request for federal extension .....	<input type="text"/>	
Amount paid for federal balance due (less interest and penalties) .....	<input type="text"/>	
Federal earned income credit .....	<input type="text"/>	
Federal additional child tax credit .....	<input type="text"/>	
Federal American opportunity credit .....	<input type="text"/>	
Federal net premium tax credit .....	<input type="text"/>	
Federal excess Social Security tax withheld .....	<input type="text"/>	
Credit for federal tax on fuels .....	<input type="text"/>	
Other refundable federal tax credits .....	<input type="text"/>	
	<input type="text" value="Taxpayer"/>	<input type="text" value="Spouse"/>
Iowa net income .....	<input type="text"/>	<input type="text"/>
Federal income not subject to withholding .....	<input type="text"/>	<input type="text"/>
Federal SE tax .....	<input type="text"/>	<input type="text"/>
Federal income tax withheld .....	<input type="text"/>	<input type="text"/>

**Enter Any Additional Iowa Information:**




2021

General Information:

County .....

School district number .....

Enter the amount of Internet or out of state purchases for which you did not pay sales tax .....

Residency Information:

From (Mo/Da/Yr) To (Mo/Da/Yr)

If you did not live in Kansas for all of 2021, enter the dates you did live in Kansas .....

Enter the state names other than Kansas where you had income .....

Education Savings:

Did you or your spouse make any contributions to a Learning Quest or other state's qualified tuition (Section 529) plan account? Yes No

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

ABLE Savings Account:

Did you or your spouse make any contributions to an ABLE savings account? Yes No

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

- Kansas Nongame Wildlife Improvement Fund (Chickadee Checkoff)
Senior Citizens Meals on Wheels Contribution Program
Breast Cancer Research Fund
Military Emergency Relief Fund
Kansas Hometown Heroes Fund
Kansas Creative Arts Industry Fund
Local School District Contribution Fund
School district number (if different from above)

Intangibles Tax Information:

City .....

Township .....

Do you qualify as being disabled or blind? Yes No

County .....



2021

**Homestead and Food Sales Tax Claim Information:**

Was any part of your homestead rented or used for business? .....

Do you want to send your 2022 homestead advancement to the county treasurer? .....

Is your property tax delinquent? .....

Are you filing as surviving spouse of a disabled veteran or an active duty service member who died in the line of duty? .....

Yes	No

If you qualify as disabled and are not over 55, enter the date of your disability (Mo/Da/Yr):

Taxpayer .....

Spouse .....

**Household Income:**

2021 Amount

Social security death benefits .....

SSI and SS disability income .....

Other veteran's pensions benefits .....

TAF payments, general assistance, worker's compensation, grants and scholarships .....

Other Household Income:

Recipient	Source	2021 Amount

Other Exempt Income:

Description	2021 Amount

Please list any other members of the household that lived with you for an extended period during the tax year. Do not include your dependents.

Name	Date of Birth (Mo/Da/Yr)	Relationship	Number of Months in Household	Social Security Number

**Enter Any Additional Kansas Information:**




2021

# Kentucky Information

## General Information:

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Are you a member of the National Guard? .....

Enter the amount of Internet or out of state purchases for which you did not pay sales tax . . . .

## Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in Kentucky for all of 2021, enter the dates you did live in Kentucky .....

Enter the state names other than Kentucky where you had income .....

## Voluntary Contributions:

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you wish to contribute to the Political Party Fund?

Democratic .....

Republican .....

Enter the amount of your overpayment you wish to contribute on your 2021 tax return to:

Nature and Wildlife Fund .....	<input type="text"/>	<input type="text"/>
Child Victims' Trust Fund .....	<input type="text"/>	<input type="text"/>
Veterans' Program Trust Fund .....	<input type="text"/>	<input type="text"/>
Breast Cancer Research and Education Trust Fund .....	<input type="text"/>	<input type="text"/>
Farm to Food Banks Trust Fund .....	<input type="text"/>	<input type="text"/>
Local History Trust Fund .....	<input type="text"/>	<input type="text"/>
Special Olympics Kentucky .....	<input type="text"/>	<input type="text"/>
Pediatric Cancer Research Trust Fund .....	<input type="text"/>	<input type="text"/>
Rape Crisis Center Trust Fund .....	<input type="text"/>	<input type="text"/>
Court Appointed Social Advocate Trust Fund .....	<input type="text"/>	<input type="text"/>
YMCA Youth Association Fund .....	<input type="text"/>	<input type="text"/>

## Enter Any Additional Kentucky Information:






2021

General Information:

Enter the amount of Internet or out of state purchases for which you did not pay sales tax

Residency Information:

From (Mo/Da/Yr) To (Mo/Da/Yr)

If you did not live in Louisiana for all of 2021, enter the dates you did live in Louisiana

Enter the state names other than Louisiana where you had income

Education Savings:

Yes No

Did you or your spouse make any contributions to a START Savings Program account?

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

- Military Family Assistance Fund
Coastal Protection and Restoration Fund
Wildlife Habitat and Natural Heritage Trust Fund
Louisiana Cancer Trust Fund
Louisiana Pet Overpopulation Advisory Council
Louisiana Food Bank Association
Make-A-Wish Foundation of the Texas Gulf Coast and Louisiana
Louisiana Association of United Ways / LA 2-1-1
American Red Cross
Louisiana National Guard Honor Guard for Military Funerals
Louisiana Horse Rescue Association
Louisiana Coalition Against Domestic Violence
Louisiana State Troopers Charities, Inc.
Friends of Palmeto State Park
Children's Therapeutic Services at the Emerge Center
Additional Donation to the Military Family Assistance Fund
Additional Donation to Coastal Protection and Restoration Fund
Additional Donation to Louisiana Food Bank Association
The START Program
Dreams Come True, Inc

Grid for entering contribution amounts





2021

General Information:

Are you engaged in commercial farming or fishing? [ ] Yes [ ] No

Enter the amount of Internet or out of state purchases for which you did not pay sales tax [ ]

Residency Information:

From (Mo/Da/Yr) To (Mo/Da/Yr)

If you did not live in Maine for all of 2021, enter the dates you did live in Maine \_\_\_\_\_

Enter the state names other than Maine where you had income \_\_\_\_\_

Education Savings:

Did you or your spouse make any contributions to a qualified state tuition (Section 529) plan account? [ ] Yes [ ] No

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Endangered and Nongame Wildlife Fund [ ]

Maine Children's Trust [ ]

Companion Animal Sterilization Fund [ ]

Maine Military Family Relief Fund [ ]

Maine Veterans' Memorial Cemetery Maintenance Fund [ ]

Maine Public Library Fund [ ]

Do you want \$3.00 to go to the Maine Clean Election Fund? [ ] Yes [ ] No

Does your spouse want \$3.00 to go to this fund? [ ] Yes [ ] No

Park Passes:

Number of park passes to be purchased:

Individual park pass? \_\_\_\_\_

Vehicle park pass? \_\_\_\_\_





2021

General Information:

Political subdivision .....

If the political subdivision is not known, enter the county of residence and city, town, or taxing area:

County of residence on December 31, 2021 .....

Incorporated city, town or taxing area on December 31, 2021 .....

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you qualify as totally disabled? .....

Do you or will you have health care coverage at the time the income tax return is filed? .....

If No, do you want to authorize the Comptroller of Maryland to share information from this tax return with the Maryland Health Benefit Exchange for the purpose of determining pre-eligibility for low- or no-cost health care coverage? .....

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

Are you or your spouse a member of the military? .....

Do all dependents that will be listed on the return have or will they have health care coverage at the time the income tax return is filed? .....

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
--------------------------	-----	--------------------------	----

Residency Information:

If you did not live in Maryland for all of 2021:

Enter the dates you did live in Maryland .....

Enter the other state of residence .....

Enter the state names other than Maryland where you had income .....

Pennsylvania residents:

What is the name of your township? .....

What is the name of your county? .....

If you are a nonresident of Maryland, did you reside the full year in your state of legal residency? .....

From (Mo/Da/Yr)	To (Mo/Da/Yr)

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
--------------------------	-----	--------------------------	----

Education Savings:

Did you or your spouse make any contributions to a Maryland Prepaid College Trust or Maryland College Investment Plan Account? .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If Yes, enter the following:

TS	Name of Designated Beneficiary	Type of Plan	Social Security Number	Account Number	2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Chesapeake Bay and Endangered Species Fund .....	
Maryland Cancer Fund .....	
Developmental Disabilities Services and Support Fund .....	
Fair Campaign Financing Fund .....	

Long-Term Care Insurance Information:

Name of Insured	Age	Social Security Number	Relationship to Taxpayer	Amount of Premium Paid





2021

General Information:

Has your name changed since filing your 2020 income tax return? .....

Are you or your spouse a noncustodial parent? .....

Would you like to choose the optional 5.85% tax rate? .....

Did you or your spouse make voluntary paid family and medical leave contributions from self-employment income? .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

If Yes, enter the amount .....

Total purchases in 2021 subject to Massachusetts use tax .....

Sales/use tax paid to other state or jurisdiction .....

Taxpayer		Spouse	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you qualify for the blind exemption? .....

Are you or your spouse a veteran of the U.S. armed forces Operations Enduring Freedom, Iraqi Freedom, or Noble Eagle? .....

Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total paid for weekly/monthly commuter passes and FastLane tolls .....

Residency Information:

If you did not live in Massachusetts for all of 2021, enter the dates you did live in Massachusetts .....

Enter the state names other than Massachusetts where you had income .....

From (Mo/Da/Yr)	To (Mo/Da/Yr)

Voluntary Contributions:

Do you want to contribute \$1.00 to the Massachusetts Election Campaign Fund?

Taxpayer .....

Spouse .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Enter the amount you wish to contribute on your 2021 tax return to:

Organ Transplant Fund .....

Endangered Wildlife Conservation .....

Massachusetts Public Health HIV and Hepatitis Fund .....

Massachusetts United States Olympic Fund .....

Massachusetts Military Family Relief Fund .....

Homeless Animal Prevention and Care Fund .....

Rental Deduction Information:

Name of landlord .....

Rent paid .....



2021

Schedule HC Health Insurance Provider Information

Private or Other Government Provider

Taxpayer

Spouse

Name of Insurance Company or Administrator or Other Provider

Federal Identification Number of Insurance Company

Subscriber Number

Schedule HC Government - Subsidized Health Insurance

Taxpayer

Spouse

Table with 2 columns (Taxpayer, Spouse) and 7 rows of insurance types: Commonwealth Care, ConnectorCare, MassHealth, Medicare, Veterans Administration Program Enrollment, Tri-Care, Other (see instructions), Applied for MassHealth or Commonwealth Care in 2021 and denied.

Months Covered by Health Insurance (if not all of 2021)

Table with 12 columns (Jan-Dec) and 2 rows (Taxpayer, Spouse) for reporting months covered.

Other Information

Taxpayer

Spouse

Form with various questions and checkboxes: Form MA 1099-HC not received, religious exemption questions, certificate number, monthly premium amount, employer health insurance questions, U.S. citizen status, DOR authorization.

Enter Any Additional Massachusetts Information:

Four horizontal lines for entering additional information.





2021

General Information:

Enter your school district name .....

	Taxpayer		Spouse	
	Yes	No	Yes	No
Are you hemiplegic, paraplegic, or quadriplegic? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you totally and permanently disabled? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you deaf? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive pension or retirement benefits from employment with a governmental agency that was not covered by the federal SSA? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Were you born after 1953, retired as of January 1, 2013, and received benefits from SSA exempt employment? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you blind and own your own homestead? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Are you a veteran with a service-connected disability or a surviving spouse of such a veteran? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If Yes to above, enter percentage of disability .....	_____			
Are you a surviving spouse of a veteran deceased in service? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Are you a pensioned veteran, a surviving spouse of such a veteran, or on active military duty? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Are you a surviving spouse of a nondisabled or nonpensioned veteran of the Korean War, World War II, or World War I? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
How many of your dependents:				
Are deaf? .....	_____			
Are blind or disabled? .....	_____			
Are qualified disabled veterans? .....	_____			
Were stillborn and for which you received a Certificate of Stillbirth from MDHHS? .....	_____			
Did you incur expenses related to the Historic Preservation Tax Credit? .....	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Enter the amount of Internet or out of state purchases for which you did not pay sales tax .....	<input type="text"/>			

Residency Information:

	Taxpayer		Spouse	
	From (Mo/Da/Yr)	To (Mo/Da/Yr)	From (Mo/Da/Yr)	To (Mo/Da/Yr)
If you did not live in Michigan for all of 2021, enter the dates you did live in Michigan .....	_____	_____	_____	_____
Enter the state names other than Michigan where you had income ..	_____			

Education Savings:

Did you or your spouse make any contributions to a Michigan Education Savings Program or Michigan 529 Advisor Plan account? .....

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
--------------------------	-----	--------------------------	----

If Yes, enter the following:

TS	Name of Designated Beneficiary	Type of Plan	Social Security Number	Account Number	2021 Amount Contributed



2021

**Voluntary Contributions:**

Enter the amount you wish to contribute on your 2021 tax return to:

American Red Cross Michigan Fund .....	<input type="text"/>
Animal Welfare Fund .....	<input type="text"/>
Children's Trust Fund - Prevent Child Abuse Michigan .....	<input type="text"/>
Military Family Relief Fund .....	<input type="text"/>
United Way Fund .....	<input type="text"/>

Do you wish to make a contribution on the 2021 return to the State Campaign Fund? .....

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Property Tax Credit Information:**

	Residence #1	Residence #2
Date residency began if after 1/1/21 (Mo/Da/Yr)	<input type="text"/>	<input type="text"/>
Date residency ended if before 12/31/21 (Mo/Da/Yr)	<input type="text"/>	<input type="text"/>
Address of homestead:		
Street number and name .....	<input type="text"/>	<input type="text"/>
City or township .....	<input type="text"/>	<input type="text"/>
State .....	<input type="text"/>	<input type="text"/>
ZIP code .....	<input type="text"/>	<input type="text"/>
Taxable value of homestead if owned .....	<input type="text"/>	<input type="text"/>
Current year property taxes .....	<input type="text"/>	<input type="text"/>
Landlord, housing project or care facility:		
Name .....	<input type="text"/>	<input type="text"/>
Street address .....	<input type="text"/>	<input type="text"/>
City .....	<input type="text"/>	<input type="text"/>
State .....	<input type="text"/>	<input type="text"/>
ZIP code .....	<input type="text"/>	<input type="text"/>
Number of months rented .....	<input type="text"/>	<input type="text"/>
Monthly rent .....	<input type="text"/>	<input type="text"/>
Total rent paid .....	<input type="text"/>	<input type="text"/>
Non-homestead property tax millage .....	<input type="text"/>	<input type="text"/>

**Farmland Preservation Tax Credit Information:**

County Code	Contract Number	Expiration Date (Mo/Da/Yr)	Joint Owner Name	Joint Owner Social Security Number	Partner's Share of Income
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



2021

Home Heating Credit:

County .....

Are heating costs currently included in your rent payments?
Do you want your name and address referred to other government assistance programs?
Do you and/or your spouse receive Supplemental Security Income (SSI)?

If you and/or your spouse live in one of the following care facilities, please indicate which one:
Nursing home, adult foster care home, home for the aged or substance abuse center

How much were you billed for heat between 11/1/20 - 10/31/21?

Number of persons sharing the home who are eligible to file a claim

Are there any dependents being claimed on the return who do not qualify for the home heating credit?

Are there members of the household other than the taxpayer, spouse, and dependents being claimed on the return who qualify for the home heating credit?

If Yes, provide the following:

Is the household member a U.S. citizen or qualified alien?

Table with 4 columns: Name, Social Security Number, Age, Yes or No

Household Resources:

Enter the amount you received for:

Child support and foster care payments

Worker's compensation, veteran's disability compensation and veteran's pension benefits

Strike pay, SUB pay, long-term disability benefits and income protection insurance benefits

Trade Act of 1974 (TRA) benefits

Gifts or expenses paid on your behalf

Table with 2 columns: Other Household Resources, Amount

Enter Any Additional Michigan Information:

Multiple empty lines for additional information.



2021

Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in Minnesota for all of 2021, enter the dates you did live in Minnesota .....

Enter the state names other than Minnesota where you had income .....

Education Savings:

Yes	No
-----	----

Did you or your spouse make any contributions to a qualified education savings account? .....

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to the Nongame Wildlife Fund .....

If you or your spouse wish to contribute \$5.00 to a political party, select one party:

Taxpayer:     Republican     Democratic/Farmer-Labor     Independence     Grassroots - Legalize Cannabis  
                   Green                    Libertarian                    Legal Marijuana Now     General Campaign Fund

Spouse:        Republican     Democratic/Farmer-Labor     Independence     Grassroots - Legalize Cannabis  
                   Green                    Libertarian                    Legal Marijuana Now     General Campaign Fund

Qualified School Expenses for Dependents:

	Dependent 1	Dependent 2
Dependent's name .....		
Dependent's grade .....		
Qualified expenses .....	<input type="text"/>	<input type="text"/>
Type of school (public, private, home) .....		
Type of expense (Classes, Individual instruction, Textbooks, Computer, Tuition, Transportation, Musical instrument) .....		
Type of Instruction (Class or Individual) .....		
Instructor or organization or Transportation provider .....		
Type of class .....		
Type of musical instrument .....		



2021

**Credit for Parents of Stillborn Children:**

Did you or your spouse experience a stillbirth during the year?  Yes  No

If Yes, include the Minnesota Certificate of Birth for each stillborn child.

**Long Term Care Insurance:**

If you had long term care insurance, list the policy owner, policy company name and policy number below.

Policy Owner	Policy Company Name	Policy Number
Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint <input type="checkbox"/>		
Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Joint <input type="checkbox"/>		

**Property Tax Refund Information:**

**Include all Certificates of Rent Paid and/or Statements of Property Taxes Payable in 2022**

County of residence .....

Were you or your spouse disabled on or before December 31, 2021? .....

Are you living in a nursing home or other health care facility? .....

Did you own AND occupy your homestead on BOTH January 2, 2021 and January 2, 2022? .....

Are you a mobile home owner who paid rent for property on which it was located? .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Enter the percent of your home that is NOT used for business or rented to others ..... %

Enter the amount of property tax refund received .....

**Employer Transit Pass Credit:**

Did your business buy Transit passes to resell or give to your employees?  Yes  No

If Yes, what was the original cost of the passes? .....

What amount was charged to employees for the passes? .....

What is your Minnesota ID number? .....

**Student Loan Credit**

	Taxpayer	Spouse
Enter the total amount paid toward your or your spouse's qualified student loans during the year .....	<input type="text"/>	<input type="text"/>

Enter the amount of interest paid on your or your spouse's qualified student loans during the year .....	<input type="text"/>	<input type="text"/>
--	----------------------	----------------------

Enter the original balance of your or your spouse's qualified student loans .....	<input type="text"/>	<input type="text"/>
---	----------------------	----------------------





2021

# Mississippi Information

### General Information:

County of residence .....

Enter the amount of Internet or out of state purchases for which you did not pay sales tax .....

### Residency Information:

If you had income from a state other than Mississippi during 2021, enter the name of the other state(s) .....

### Education Savings:

Did you or your spouse make any contributions to a Mississippi Prepaid Affordable College Tuition Program (MPACT) or Mississippi Affordable College Savings (MACS) account? .....  **Yes**  **No**

If Yes, enter the following:

TS	Name of Designated Beneficiary	Type of Plan	Social Security Number	Account Number	2021 Amount Contributed

### Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Mississippi Military Family Relief Fund .....

Mississippi Wildlife Heritage Fund .....

Mississippi Educational Fund .....

Mississippi Commission for Volunteer Service Fund .....

Mississippi Burn Care Fund .....

Mississippi Wildlife Fisheries and Parks Foundation .....

### Enter Any Additional Mississippi Information:




2021

General Information:

County of residence .....

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you qualify as disabled? .....

Do you or your spouse qualify as a 100 percent disabled veteran? .....

Are you 60 years of age or older and did you receive surviving spouse social security benefits? .....

Did you make contributions to a health care sharing ministry? .....

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

Residency Information:

Taxpayer		Spouse	
From (Mo/Da/Yr)	To (Mo/Da/Yr)	From (Mo/Da/Yr)	To (Mo/Da/Yr)

If you did not live in Missouri for all of 2021:

Enter the dates you did live in Missouri .....

Enter the dates you lived in the other state .....

Enter the state names other than Missouri where you had income ..

Education Savings:

Did you or your spouse make any contributions to a Missouri Savings for Tuition Program (MOST) account? .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Children's Trust Fund .....	<input type="text"/>	Pediatric Cancer Research Trust Fund	<input type="text"/>
Veteran's Trust Fund .....	<input type="text"/>	American Heart Association Fund .....	<input type="text"/>
Elderly Home Delivered Meals Trust Fund	<input type="text"/>	Soldiers Memorial Military	<input type="text"/>
Missouri National Guard Trust Fund .....	<input type="text"/>	Museum in St. Louis Fund .....	<input type="text"/>
Workers' Memorial Fund .....	<input type="text"/>	Amyotrophic Lateral Sclerosis (ALS) Fund .....	<input type="text"/>
Childhood Lead Testing Fund .....	<input type="text"/>	Arthritis Foundation Fund .....	<input type="text"/>
American Cancer Society Heartland Division Inc., Fund .....	<input type="text"/>	March of Dimes Fund .....	<input type="text"/>
American Diabetes Association Gateway Area .....	<input type="text"/>	Muscular Dystrophy Association Fund	<input type="text"/>
Kansas City Regional Law Enforcement Memorial Foundation Fund .....	<input type="text"/>	National Multiple Sclerosis Society Fund	<input type="text"/>
Foster Care and Adoptive Recruitment and Retention Fund .....	<input type="text"/>	Missouri Military Family Relief Fund .....	<input type="text"/>
Missouri National Guard Foundation Fund	<input type="text"/>	General Revenue Fund .....	<input type="text"/>
		Donate Life Organ Donor Program Fund	<input type="text"/>







2021

General Information:

Taxpayer	Spouse
----------	--------

Enter the number of exemptions for handicapped dependent children .....

Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in Montana for all of 2021, enter the dates you did live in Montana .....

Enter the state names other than Montana where you had income .....

Education Savings:

Did you or your spouse make any contributions to a Montana Family Education Savings Program or other state's qualified tuition (Section 529) plan that is not a prepaid tuition plan? .....

Yes	No
-----	----

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Nongame Wildlife Program .....

Agriculture in Schools .....

Child Abuse Prevention .....

Military Family Relief Fund .....

Taxpayer	Spouse

College Contribution Credit:

TSJ	Donation(s) Made To	Total Amount

Elderly Homeowner/Renter Credit if Over Age 62:

Number of months occupied Montana residence .....

Rent paid .....	
Public assistance received .....	

Federal Tax Data:

Federal estimated tax payment paid in 2021 .....

Federal income taxes paid in 2021 for 2020 and prior years .....

Taxpayer	Spouse





2021

Nebraska Information

General Information:

County of residence .....

School district name .....

Are you on active duty in the military?  Yes  No

Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in Nebraska for all of 2021, enter the dates you did live in Nebraska .....

Enter the state names other than Nebraska where you had income .....

Education Savings:

Did you or your spouse make any contributions to a Nebraska College Savings Program account?  Yes  No

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

Use Tax:

Enter the amount of Internet or out of state purchases for which you did not pay sales tax .....

Local jurisdiction to which use tax is owed .....

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:  
Wildlife Conservation Fund Donation .....

Enter Any Additional Nebraska Information:




2021

# New Hampshire Information (Page 1 of 2)

## General Information:

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you qualify as disabled? .....

If the IRS has made adjustments to your federal income tax return that have not been previously reported to New Hampshire, indicate which years .....

## Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in New Hampshire for all of 2021, enter the dates you did live in New Hampshire .....

Enter the state names other than New Hampshire where you had income .....

## Passthrough Distributions Subject to Interest and Dividends Tax

Payer's Name	Payer's ID	Entity Type	Amount	FSO

## Other Nontaxable Interest and Dividends

TSJ .....

Payer's Name .....

Payer's Identification Number .....

Tax-Exempt Type .....

Tax-Exempt Interest .....



2021

**Business General Information:**

Single Member LLC Name .....

Department Identification Number .....

Has the name changed since last year .....  
If Yes, enter the former name .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

Is this a final return? .....

**Business Activity Information:**

In what city and state are the books kept? .....

What is the principal business activity? .....

What country are the records kept in if not the U.S.? .....

What is the state of incorporation? .....

What year was your first New Hampshire business return filed? .....

What year was the business registered with the New Hampshire Secretary of State? .....

**Business Locations:**

**In New Hampshire:**

City/Town Location of Factories, Sales Offices, Warehouses, Construction Sites

**Outside New Hampshire:**

Location City and State	Factory, Sales Office, Warehouse, Construction Site, Etc.

**Enter Any Additional New Hampshire Information:**




2021

General Information:

County or municipality of residence .....

How many dependents do you have attending college? .....

Do you qualify as disabled? .....

Table with columns: Taxpayer (Yes, No), Spouse (Yes, No)

Enter the amount of Internet or out of state purchases for which you did not pay sales tax

Did you, your spouse, and all household members have insurance coverage for the entire year? .....

Attach all Forms 1095 received and/or any applicable exemption information.

Residency Information:

Table with columns: From (Mo/Da/Yr), To (Mo/Da/Yr)

If you did not live in New Jersey for all of 2021, enter the dates you did live in New Jersey .....

Enter the state names other than New Jersey where you had income .....

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Table with rows for various funds: Endangered and Nongame Species of Wildlife Conservation Fund, Children's Trust Fund, Breast Cancer Research Fund, Vietnam Veterans' Memorial Fund, USS New Jersey Educational Museum Fund

Other contributions. Choose one fund from the list below and enter the amount you wish to contribute on your 2021 tax return:

Fund .....

Amount .....

Other contribution funds:

Large table listing various contribution funds such as Drug Abuse Education Fund, American Red Cross - NJ Fund, etc.

Do you want \$1 to go to the Gubernatorial Election Fund? .....

Table with columns: Taxpayer (Yes, No), Spouse (Yes, No)







2021

General Information:

Enter the name of your Indian nation, tribe or pueblo for taxpayer

Enter the name of your Indian nation, tribe or pueblo for spouse

Enter the amount of income earned on your reservation or pueblo by enrolled member

Residency Information:

From (Mo/Da/Yr) To (Mo/Da/Yr)

If you did not live in New Mexico for all of 2021, enter the dates you did live in New Mexico

Enter the state names other than New Mexico where you had income

Education Savings:

Yes No

Did you or your spouse make any contributions to a New Mexico Education Trust Fund account?

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Table listing various funds like New Mexico Housing Trust Fund, Share with Wildlife, etc., with corresponding input boxes.

If you or your spouse wish to contribute \$2.00 to a political party, specify a party:

Taxpayer . . . [ ] Democratic [ ] Republican [ ] Libertarian [ ] Green [ ] Better for America [ ] Constitution

Spouse . . . [ ] Democratic [ ] Republican [ ] Libertarian [ ] Green [ ] Better for America [ ] Constitution





2021

General Information:

Resident county

School district name

School district code number

Taxpayer Spouse

Driver's license document ID (if issued by NY)

Did you make out of state, Internet or catalog purchases on which no sales tax was paid? If Yes, enter the number of months the taxpayer maintained a permanent place of abode in NY

Did you receive a property tax freeze credit? If Yes, enter the amount

Have you (or an entity of which you are an owner) been convicted of Bribery Involving Public Servants and Related Offenses, Corrupting the Government, or Defrauding the Government?

Permanent Home Address if Different from Mailing Address:

Street Apartment number City ZIP code Foreign country

Residency Information:

From To (Mo/Da/Yr) (Mo/Da/Yr)

If you did not live in New York state for all of 2021, enter the dates you did live in New York

If you were not a resident of New York state for any of 2021, enter the number of days spent in the state

Were you a part-year resident and received New York State income during nonresidency period?

If only one spouse had New York income, indicate which spouse - Taxpayer or Spouse

Did you maintain living quarters in New York state? If Yes, enter address(es) below:

Do you still maintain these living quarters in New York? Were New York State living quarters maintained for the entire year? Were you a New York City resident for only part of the taxable year?

From To (Mo/Da/Yr) (Mo/Da/Yr)

If Yes, enter the dates you did live in New York City

Were you a Yonkers resident for only part of the taxable year?

From To (Mo/Da/Yr) (Mo/Da/Yr)

If Yes, enter the dates you did live in Yonkers

Did you live in a nursing home during 2021? Did you reside in public housing or other residence completely exempted from real property taxes in 2021?



2021

Education Savings:

Did you or your spouse make any contributions to a New York 529 College Savings Program or New York State College Choice Tuition Savings Program account? Yes No

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Would you like to allocate some or all of your refund to a New York 529 College Savings Program? Yes No

Plan code:
552 - College Savings Program Direct Plan
553 - Advisor Guided College Savings Program

Table with 5 columns: Routing Number, Plan Code, Account Number, 2021 Amount to Contribute

Voluntary Gifts/Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Table listing various charitable organizations and their corresponding contribution amount boxes.

Enter Any Additional New York Information:

Large empty rectangular box for providing additional information.



2021

# New York - Worksheet

## Wages and Salaries Earned in New York State or Yonkers:

If you worked in and out of New York State or Yonkers, please complete the following information for each job worked while a nonresident.

Wages earned .....

Total days employed if less than full year .....

Saturdays and Sundays (not worked) .....

Holidays (not worked) .....

Sick leave .....

Vacation .....

Other nonworking days .....

Days worked outside state/city .....

Days worked at home .....

Select state/city: NY, Yonkers or NY/Yonkers .....

Job #1
T/S ____
<input type="text"/>
_____
_____
_____
_____
_____
_____
_____
_____

Job #2
T/S ____
<input type="text"/>
_____
_____
_____
_____
_____
_____
_____
_____

Wages earned .....

Total days employed if less than full year .....

Saturdays and Sundays (not worked) .....

Holidays (not worked) .....

Sick leave .....

Vacation .....

Other nonworking days .....

Days worked outside state/city .....

Days worked at home .....

Select state/city: NY, Yonkers or NY/Yonkers .....

Job #3
T/S ____
<input type="text"/>
_____
_____
_____
_____
_____
_____
_____
_____

Job #4
T/S ____
<input type="text"/>
_____
_____
_____
_____
_____
_____
_____
_____













2021

General Information:

Taxpayer		Spouse	
Yes	No	Yes	No

Do you qualify as disabled? .....

If you are a retired U.S. Government employee receiving a federal pension,  
enter the payer's name and dates you worked for the U.S. Government.

TSJ	Payer's Name	From (Mo/Da/Yr)	To (Mo/Da/Yr)

Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
-----------------	---------------

If you did not live in Oregon for all of 2021, enter the dates you did live in Oregon .....

Enter the state names other than Oregon where you had income .....

Education Savings:

Yes	No
-----	----

Did you or your spouse make any contributions to a 529 Oregon College Savings Network account? .....

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Portfolio Number	Account Number	2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

American Red Cross .....		Alzheimer's Disease Research .....	
Oregon Historical Society .....		OR Head Start Association .....	
Child Abuse Prevention .....		Albertina Kerr Centers .....	
Habitat for Humanity .....		Stop Domestic and Sexual Violence ..	
Oregon Food Bank .....		OR Military Financial Assistance .....	

Other Charity (Choose up to two of the following):

American Diabetes Association .....		Oregon Coast Aquarium .....	
SMART .....		SOLVE .....	
St. Vincent de Paul .....		The Nature Conservancy .....	
Doernbecher Children's Hospital .....		Oregon Humane Society .....	
The Salvation Army .....		Oregon Veteran's Home .....	
Planned Parenthood of OR .....		LIONS .....	
Shriner's Hospital for Children .....		Special Olympics Oregon .....	
Susan G. Komen for the Cure .....		Cascade AIDS project .....	
Oregon Nongame Wildlife .....		Veterans Suicide Prevention .....	
ALS Association .....			

If you or your spouse wish to contribute \$3.00 to a political party, specify a party.

Taxpayer:  Constitution     Democratic     Independent     Libertarian  
 Republican     Pacific Green     Progressive     Working Families

Spouse:  Constitution     Democratic     Independent     Libertarian  
 Republican     Pacific Green     Progressive     Working Families





2021

General Information:

Taxpayer

Spouse

Daytime telephone number (including area code) . . . . .

Gambling and lottery winnings . . . . .

Name of county . . . . .

School district name . . . . .

Note: If your school district has changed, update the school district shown above.

Enter the amount of Internet or out of state purchases or services for which you did not pay sales tax . . . . .

Residency Information:

From (Mo/Da/Yr)

To (Mo/Da/Yr)

If you did not live in Pennsylvania for all of 2021, enter the date you moved into or out of Pennsylvania:

Taxpayer . . . . .

Spouse . . . . .

Education Savings:

Did you or your spouse make any contributions to a Pennsylvania 529 College Savings Program or other state's qualified tuition (Section 529) account? . . . . .

Yes

No

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Voluntary Contributions:

Enter the amount that you wish to contribute on your 2021 tax return to:

Taxpayer

Spouse

- PA Breast Cancer Coalition's Refunds for Breast and Cervical Cancer Research Fund
Wild Resource Conservation Fund
Military Family Relief Assistance Program
Governor Robert P. Casey Memorial Organ and Tissue Donation Awareness Trust Fund
Juvenile (Type 1) Diabetes Cure Research Fund
American Red Cross
PA Children's Trust Fund
Pediatric Cancer Research Fund
Veterans' Trust Fund
Pennsylvania 529 College Savings Program Account:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, Donation Amount





2021

General Information:

City or town of legal residence .....

Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in Rhode Island for all of 2021, enter the dates you did live in Rhode Island .....

Enter the state names other than Rhode Island where you had income .....

Consumer Use Tax:

Enter the amount of Internet or out of state purchases for which you did not pay Rhode Island sales tax .....

Enter the amount of use tax paid to another state .....

Did you or your spouse make any individual purchases over \$1,000 for which you did not pay Rhode Island sales tax?  Yes  No

If Yes, enter the following:

Description	Amount	Sales Tax Paid

Education Savings:

Did you or your spouse make any contributions to a Tuition Savings Program account?  Yes  No

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Drug Program Account .....	<input type="text"/>
Organ Transplant Fund .....	<input type="text"/>
Council on the Arts .....	<input type="text"/>
Nongame Wildlife Appropriation .....	<input type="text"/>
Childhood Disease Victim's Fund and Substance Use and Mental Health Leadership Council .....	<input type="text"/>
Military Family Relief Fund .....	<input type="text"/>

Do you want to contribute to the Olympics?  Yes  No

If you wish to contribute \$2.00 to a political party, specify a party or select to contribute to the nonpartisan general fund.

Democrat
  Republican
  Moderate
  Nonpartisan





2021

# South Carolina Information

## General Information:

County .....

Enter the amount of Internet or out of state purchases for which you did not pay sales tax .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

Did you or your spouse serve in a military combat zone during 2021? .....

If Yes, enter the name of the combat zone .....

## Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
<input type="text"/>	<input type="text"/>

If you did not live in South Carolina for all of 2021, enter the dates you did live in South Carolina .....

Enter the state names other than South Carolina where you had income .....

## Education Savings:

Did you or your spouse make any contributions to a South Carolina College Investment Program or South Carolina Tuition Prepayment Program account? .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

## Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Endangered Wildlife Fund .....	<input type="text"/>	Litter Control Enforcement Program ..	<input type="text"/>
Children's Trust Fund .....	<input type="text"/>	K-12 Public Education Fund .....	<input type="text"/>
Eldercare Trust Fund .....	<input type="text"/>	State Parks Fund .....	<input type="text"/>
Veterans' Trust Fund .....	<input type="text"/>	Military Family Relief Fund .....	<input type="text"/>
Donate Life South Carolina .....	<input type="text"/>	Conservation Bank Trust Fund .....	<input type="text"/>
First Steps to School Readiness Trust Fund ..	<input type="text"/>	Financial Literacy Trust Fund .....	<input type="text"/>
War Between States Heritage Trust Fund ..	<input type="text"/>	Association of Habitat Affiliates .....	<input type="text"/>
Law Enforcement Assistance Program .....	<input type="text"/>	Department of Natural Resources Fund ..	<input type="text"/>
State Forests Fund .....	<input type="text"/>	Department of Archives and History ..	<input type="text"/>

## Classroom Teacher Expenses Credit:

Amount spent on teacher supplies and materials .....

Amount reimbursed from school or district .....

## Enter Any Additional South Carolina Information:








2021

# Utah Information

## General Information:

If you are a member of an Indian nation or tribe, enter the name of the Indian nation or tribe - Taxpayer .....

- Spouse .....

Tribal enrollment or census number - Taxpayer .....

- Spouse .....

Enter the amount of Internet or out of state purchases for which you did not pay sales tax .....

## Residency Information:

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not live in Utah for all of 2021, enter the dates you did live in Utah .....

Enter the state names other than Utah where you had income .....

## Education Savings:

Yes	No
-----	----

Did you or your spouse make any contributions to a my529 account? .....

If Yes, include all Forms TC-675H and enter the following:

TS	Name of Designated Beneficiary	Social Security Number	Account Number	2021 Amount Contributed

## Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Pamela Atkinson Homeless Account .....

Kurt Oscarson Children's Organ Transplant Account .....

School District and Nonprofit School District Foundation .....

Name of School District .....

Clean Air Fund .....

Governor's Suicide Prevention Fund .....

If you or your spouse wish to contribute to the Election Campaign Fund, please specify a party:

Taxpayer:  Democratic  Republican  Constitution  Libertarian  Independent American  
 Green  United Utah

Spouse:  Democratic  Republican  Constitution  Libertarian  Independent American  
 Green  United Utah

## Enter Any Additional Utah Information:




2021

General Information:

911 street address at end of 2021, if different than mailing address
School district name

Enter the amount of Internet or out of state purchases for which you did not pay sales tax

Taxpayer Spouse
Yes No Yes No
Did you and your spouse have full-year health care coverage?

Residency Information:

From To
(Mo/Da/Yr) (Mo/Da/Yr)

If you did not live in Vermont for all of 2021, enter the dates you did live in Vermont
Enter the Canadian provinces or state names other than Vermont where you had income

Education Savings:

Yes No
Did you or your spouse make any contributions to a Vermont Higher Education Investment Plan account?

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Vermont Nongame Wildlife Fund
Vermont Children's Trust Fund
Vermont Veterans' Fund
Green Up Vermont Fund

Payments:

If you sold real estate in Vermont and the buyer withheld Vermont income tax, enter the amount withheld and include Form RW-171
2021 nonresident estimated payments made on your behalf by a partnership, limited liability company, or S corporation. Include Schedule K-1VT

Income Adjustments:

Military pay when on active duty outside Vermont
Months on active military duty
Bond/note interest from VSAC
Bond/note interest from Build America
Bond/note interest from VT Telecommunication Authority
Bond/note interest from VT Public Power Supply Authority



2021

**Tax Credits:**

Charitable Housing Credit .....	<input type="text"/>
Qualified Sale of Mobile Home Park Credit .....	<input type="text"/>
Research & Development Credit .....	<input type="text"/>
Affordable Housing Credit .....	<input type="text"/>
Rehabilitation of Certified Historic Buildings Credit .....	<input type="text"/>
Historic Rehabilitation Credit .....	<input type="text"/>
Facade Improvement Credit .....	<input type="text"/>
Code Improvements Credit .....	<input type="text"/>
Entrepreneur's Seed Capital Fund Credit .....	<input type="text"/>

**Household Income Information:**

Enter household income information if claiming either the Renter Rebate or Property Tax Adjustment.

	Taxpayer	Spouse	All Others
Enter the amount you received from:			
Cash public assistance/welfare .....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Veterans' benefits .....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Workers' compensation .....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Support money/child support .....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gifts of cash or cash equivalent .....	<input type="text"/>	<input type="text"/>	<input type="text"/>

Enter the amount you paid for child support .....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of person paid .....	<input type="text"/>	<input type="text"/>	<input type="text"/>
Social security number of person paid .....	<input type="text"/>	<input type="text"/>	<input type="text"/>

	Name	Social Security Number
Others contributing to household income .....	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

**Renter Rebate Claim Information:**

Include all Forms LC-142.

Location of rental property if not current address .....

Total rent from Form LC-142 .....

Percent of rented property used for home if not 100% .....

 %



2021

Homestead Declaration Information:

Location of homestead if not current address

SPAN (School Property Account Number)

Percent of business use of dwelling %

Percent of rental use of dwelling %

Are improvements of other buildings located on your parcel, other than the dwelling used for business or rented out? Yes No

Are you the grantor and sole beneficiary of a revocable trust owning the property?

Are you the life estate holder of the property?

Are you the owner of homestead property crossing town boundaries?

Are you residing in a dwelling owned by a related farmer?

Property Tax Adjustment Information:

Enclose a copy of your property tax bill and/or Lister's Certification of the homestead value and proof of payment. Enclose statement of school property tax allocable to your homestead from your land trust, cooperative or non-profit mobile home park.

Were you domiciled in VT all year? Yes No

Do you anticipate selling your housesite on or before April 1, 2022? Yes No

From 2021/2022 property tax bill: Housesite value Housesite education tax Housesite municipal tax

Percent of ownership interest if not 100% %

Mobile home lot rent from Form LC-142

Allocated property tax from land trust, cooperative, or non-profit mobile home park: Allocated education tax Allocated municipal tax

Property tax from contiguous property if housesite has less than 2 acres: Contiguous property education tax Contiguous property municipal tax

Enter Any Additional Vermont Information:

Empty table for additional information



2021

General Information:

City or county of residence on January 1, 2022:

Taxpayer
Spouse

Enter the amount of Internet or out of state purchases for which you did not pay sales tax

Table with 2 columns: Taxpayer, Spouse

Residency Information:

Table with 4 columns: Taxpayer (From, To), Spouse (From, To)

If you did not live in Virginia for all of 2021, enter the dates you did live in Virginia

Enter the state names other than Virginia where you had income

Education Savings:

Yes No

Did you or your spouse make any contributions to a Virginia College Savings Plan account?

If Yes, enter the following:

Table with 6 columns: TS, Name of Designated Beneficiary, Type of Plan, Social Security Number, Account Number, 2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

- Virginia Nongame Wildlife Program
Virginia Democratic Party political contribution
Virginia Republican Party political contribution
Virginia Housing Program
Elderly and Disabled Transportation Fund
Virginia Arts Foundation
Open Space Recreation and Conservation Fund
Chesapeake Bay Restoration Fund
Family and Children's Trust Fund (FACT)
Virginia State Forests Fund
Virginia Federation of Humane Societies
Spay and Neuter Fund
Cancer Centers of Virginia
Children of America Finding Hope
Virginia Military Family Relief Fund
Federation of Virginia Food Banks
Public School Foundation Contribution
Foundation name(s)

Table with 2 columns: Taxpayer, Spouse

Public Library Foundation Contribution
Foundation name(s)

Table with 2 columns: Taxpayer, Spouse





2021

General Information:

County of residence .....

Do you qualify as permanently and totally disabled?

Yes No
Taxpayer
Spouse

Consumer Use Tax:

Enter the amount of Internet or out of state purchases for which you did not pay sales tax
Enter the amount of use tax paid to another state
Enter the amount of purchase subject to municipal use tax
Enter the amount of use tax paid to another municipality
Enter the name of the municipality to which use tax was paid

Residency Information:

From (Mo/Da/Yr) To (Mo/Da/Yr)

If you did not live in West Virginia for all of 2021, enter the dates you did live in West Virginia
Enter the state names other than West Virginia where you had income

Education Savings:

Did you or your spouse make any contributions to a West Virginia College Savings Plan and Prepaid Tuition Trust Funds Account?

Yes No

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:
Children's Trust Fund
Department of Veterans Assistance
C. Donel C. Kinnard Memorial State Veterans Cemetery

Tax Credits:

Non-family adoption credit
General economic opportunity tax credit
West Virginia environmental agricultural equipment credit
West Virginia military incentive credit
Neighborhood investment program credit
Historic rehabilitated buildings investment credit
Qualified rehabilitated buildings investment credit
West Virginia film industry investment tax credit
Apprenticeship training tax credit
Alternative-fuel tax credit
Farm to food bank tax credit
Conceal carry gun permit credit







2021

General Information:

Enter the following information pertaining to where you live:

City
Village
Town
County
School district number
Date entered nursing home
Name of nursing home

Enter the amount of adoption fees, court costs, and legal fees relating to the adoption of a child
Enter the amount of human organ donation expenses relating to the donation of a human organ
Enter the amount of Internet or out of state purchases for which you did not pay sales tax
Amount of rent paid on your primary residence during 2021:
To a landlord who paid for heat
To a landlord who did not pay for heat

Residency Information:

From (Mo/Da/Yr) To (Mo/Da/Yr)

If you did not live in Wisconsin for all of 2021, enter the dates you did live in Wisconsin

Are you a former resident moving back to Wisconsin? Yes No

Education Savings:

Yes No

Did you or your spouse make any contributions to a Wisconsin State-Sponsored College Savings Program account?

If Yes, enter the following:

Table with 5 columns: TS, Name of Designated Beneficiary, Social Security Number, Account Number, 2021 Amount Contributed

Voluntary Contributions:

Enter the amount you wish to contribute on your 2021 tax return to:

Endangered Resources
Cancer Research
Veterans Trust Fund
Multiple Sclerosis
Military Family Relief
Second Harvest/Feeding America
Red Cross WI Disaster Relief
Special Olympics

Homestead Information:

Yes No

Was your home used for nonhomestead or nonfarm purposes during the year?

Is your home part of a farm?

If No, enter the number of acres your home is located on (to the nearest tenth)

How many months during 2021 did you receive a Wisconsin Works payment of any amount for a community service job or a transitional placement or county relief of \$400 or more?







2021

General Information:

Name of city .....

Township .....

Other township .....

Provide your present employer's:

Name .....

Address .....

Provide your spouse's present employer's:

Name .....

Address .....

	Taxpayer		Spouse	
	Yes	No	Yes	No
Do you qualify as deaf? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you qualify as disabled? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Residency Information:

Did you reside in this city for all of 2021? .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

From (Mo/Da/Yr)	To (Mo/Da/Yr)
--------------------	------------------

If you did not reside in this city for all of 2021, enter the dates you did reside in this city .....

Former address .....

Wages Earned in Other Cities:

Name/Address Where Work Performed	Gross Wages	Total Number of Days Worked	Number of Days Worked in City



2021

**Voluntary Contributions:**

Enter the amount you wish to contribute on your 2021 tax return to:

City of Albion .....	
City of Battle Creek .....	
United Way of Battle Creek Kalamazoo Region .....	
Battle Creek Charity of Choice * .....	
Big Rapids Community Pool .....	
Big Rapids Community Library .....	
Flint Indigent Water Fund .....	
American Flags for Veterans Graves in Grand Rapids .....	
Grand Rapids Children's Fund .....	
City of Hamtramck .....	
Ionia Community Library .....	
Ionia Theater .....	
Ionia Youth Recreation Program .....	
Jackson Parks and Recreation Fund .....	
Lansing Police Problem Solving .....	
Lansing Hope Scholarship .....	
Lansing Homeless Assistance .....	
Muskegon Lakeshore Trail Improvements .....	
Muskegon Heights Street Improvements .....	
City of Pontiac .....	
Saginaw Annual Fireworks .....	
Walker Comstock Park Education Foundation .....	
Walker Grandville Education Foundation .....	
Walker Kenowa Hills Education Foundation .....	
Grayling Capital Improvement Fund .....	
Grayling Northern Market .....	
Grayling Main Street .....	
City of Benton Harbor .....	
East Lansing Parks, Stewardship & Conservation .....	
East Lansing Parks and Playgrounds .....	
East Lansing Recreational Youth Scholarships .....	
Muskegon Farmers Market .....	
Muskegon Dog Beach .....	
City of Port Huron .....	

\* Include the legal name, address, and federal ID number of the chosen charity.

Do you wish to donate your entire overpayment to the City of Springfield?  Yes  No

**Enter Any Additional Michigan Cities Information:**






2021

# Ohio Cities Information

## General Information:

Name of city .....

Daytime telephone number (including area code) .....

If you moved during 2021, enter the date you moved (Mo/Da/Yr) .....

Principal business activity .....

Taxpayer's account number .....

Taxpayer's account type .....

2020 filing address .....

Are you an employee?  Yes  No

Are you a proprietor?

Did you file a return for 2020?

Did the IRS increase your tax liability for any prior year?

If Yes, did you file an amended city return?

Is your city of residence the same as your city of employment?

Note: Include any dates you earned income in any city for any employer or business below.

Is this your final return?

If Yes, why? .....

## Voluntary Contributions (Akron Only):

Enter the amount you wish to contribute on your 2021 tax return to:

Police equipment

Fire and EMS equipment

Parks and recreation equipment

## Enter Any Additional Ohio City Information:
