

2021 Intake Questionnaire

RELIABLE INCOME TAX

PORTLAND, OREGON • ESTD 1945

CONTACT INFORMATION

Taxpayer First Name	M.I.	Last Name	
Taxpayer Phone	Taxpayer Email		
Spouse First Name	M.I.	Last Name	
Spouse Phone	Spouse Email		
Primary residence address			Unit #
City	County	State	Zip
Current mailing address (if different)			Unit #
City	County	State	Zip

GENERAL INFORMATION

1. What was your marital status as of 12/31/2021? Single Married Separated Widowed
2. Yes No Are either you or your spouse legally blind? Taxpayer Spouse
3. Yes No Did you get married, divorced, or separated during 2021?
4. Yes No Were there any changes in dependents? Explain: _____
5. Yes No Did your address change during the year? Date of move: _____
6. Yes No Did you renew your State ID/Driver's License in 2021? Provide a copy.
7. Yes No Would you like an invitation to the online client portal (SmartVault)? Already activated
8. Yes No Did you take a distribution from your retirement plan because of COVID-19 in 2020 where you elected to spread the taxable amount over 3 years?
9. Yes No Did you receive any advance Child Tax Credit payments? Provide IRS Letter 6419 - for each taxpayer and spouse, if applicable.
10. Yes No Did you receive the third economic impact payment (EIP3) in 2021? Provide IRS Letter 6475 or Notice 1444-C.

INCOME AND SALES

11. Yes No Did you have foreign income or pay foreign taxes other than through a brokerage account?
12. Yes No Did you sell or transfer any stock, sell rental or investment property, have any investments become worthless, or were you granted, or did you exercise, any employee stock options?
13. Yes No Did you transfer, convert, or rollover any amount from one retirement plan to another plan?
14. Yes No Did you start a business, participate in sharing/gig activity (e.g. Airbnb, Uber, Lyft, etc.), purchase rental property, or acquire an interest in a partnership or S corporation?
Explain: _____
15. Yes No Did you receive any alimony or spousal support income?
Amount received \$ _____ Date of legal separation _____
16. Yes No Did you receive any income from an installment sale?

17. Yes No Did you have a foreclosure, repossession, or any debt, including credit cards, cancelled?
18. Yes No Did you earn any income from jury duty, prizes, awards, gambling or lottery winnings?
19. Yes No Did you receive a distribution from, or were you the grantor or transferor of a trust or estate?
20. Yes No Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency/cryptocurrency? e.g. Bitcoin, Ethereum, Dogecoin, etc.

DEDUCTIONS AND ADJUSTMENTS

21. Yes No Did you donate any money to a qualified charitable organization? Amount paid \$ _____
(For 2021, all taxpayers may deduct charitable donations even if they don't itemize.)
22. Yes No Did you pay alimony to a spouse or former spouse under a divorce or separation instrument?
Amount paid \$ _____ Date of legal separation _____
23. Yes No Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? Provide closing statement and all Forms 1098.
24. Yes No Did you use any mortgage loan proceeds or home equity lines of credit for purposes other than to buy, build, or substantially improve your principal home? Explain: _____
25. Yes No Did you or will you contribute to a retirement plan (IRA, SEP, SIMPLE, etc.) other than through your payroll withholding?
26. Yes No Did you make any HSA contributions other than through your payroll withholding?
Provide Form 5498-SA and 1099-SA, if applicable.
27. Yes No Did you pay any interest on a loan for a boat or RV that has living quarters?

CREDITS

28. Yes No Did you pay for child or dependent care so you could work or go to school?
29. Yes No Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college or university? Provide Form 1098-T for each qualified institution.
30. Yes No Did you contribute any money to a political organization or political action committee?
Amount paid \$ _____
31. Yes No Did you or will you make any contributions to a State sponsored 529 plan for 2021?
Amount contributed \$ _____ State sponsored _____
32. Yes No Did you acquire health insurance through a public exchange? Attach Form 1095-A(s).
33. Yes No Did you purchase a new electronic vehicle that qualifies for a tax credit?
34. Yes No Did you make energy-efficient improvements to your main home? e.g., solar, wind, or fuel cell.

MISCELLANEOUS

35. Yes No Did you pay estimated taxes or apply an overpayment of last year's taxes to your current year's estimated tax? Provide record of amounts and dates paid to each taxing agency.
36. Yes No Do you anticipate any significant changes in income or deductions in 2022? i.e., job change, retirement, etc. Explain: _____
37. Yes No Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, cryptocurrency, foreign trust, or other financial account?
38. Yes No Did you engage the services of household employees, such as a nanny or housekeeper whom you paid directly more than \$2,200?
39. Yes No Were you notified or audited by the Internal Revenue Service or a State taxing agency?
Provide copies of all letters you received.

TAX RETURN PREPARATION

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance.

TAXPAYER RESPONSIBILITIES

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.
- By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities.

For a joint return, both taxpayers must sign

Taxpayer Signature

Taxpayer Name (please print)

Date

Spouse Signature

Spouse Name (please print)

Date

PRIVACY POLICY

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment.

Under our policy, all information we obtain about you will be provided by you or obtained with your permission. Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.