

2021 TAX SEASON WORKSHEET

Please include this form with all tax paperwork

Along with this form, please provide me all W-2's, 1099s, 1098s, Social Security Statements, K-1s and other tax documents sent to you by employers, government agencies, financial institutions and child care providers. Don't forget 1099-B (Stock sales) and Form 1098 (Mortgage Interest Statement). Please do not send sales or medical receipts (List totals on this form)

Please check box if Spouse and Dependents information are the same as last year

Name:	Spouse:
DOB: SS#	DOB: SS#
Cell# Job title:	Cell# Job title:
email:	email:

Important: If you are a new client or had a drivers license renewal in 2020/2021, please enclose copy of Drivers License (front and back), or email a picture of DL to epalmertax@gmail.com. We will need spouses DL as well and any children if they are filing a return.

Home Address:	City/State/Zip:
Home Phone:	Advance Child Credit Total \$_____ (IRS letter 6419) 3rd Stimulus payment March 2021 (\$_____ (IRS letter 1444-C - For most people it was \$1400 per person)
Dependents and Family Credits: (Please be certain no one else is claiming the same person for the credits)	

Name:	M/F	DOB	SS#	Child/Parent/Other
Name:	M/F	DOB	SS#	Child/Parent/Other
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Name:	M/F	DOB	SS#	Child/Parent/Other
Name:	M/F	DOB	SS#	Child/Parent/Other

Direct Deposit Information:	Or provide voided check - no deposit slips please. Please update annually.	Child Care Credit: (provide documentation from provider if possible)
Bank Name:	Checking <input type="checkbox"/> Savings <input type="checkbox"/>	Provider:
Routing:	Account#	Address:
Total Student Loan Interest Paid last year \$ (Attach 1098-E)		City/State ZIP:
		Tax ID:
Total Alimony Paid	\$	Recipient SS#
<small>(Alimony for divorces finalized after 1/1/2019 won't be taxable or deductible.)</small>		
Alimony Received:	\$	Amount Paid \$
		For Which Child:
Gambling Winnings:	\$	Please provide form W-2G
		If you have more than one child care provider, please supply the annual documentation from the providers. Sometimes you have to request it.
Gambling Losses:	\$	

(Please flip to the back of the page)