CLH est. 1992 CPAs & CONSULTANTS

2021 Essential Tax Questionnaire

Client Name:_____

	YES	NO
Virtual Currency		
1. Did you or your spouse receive, sell, exchange, or otherwise dispose of any financial interest in virtual currency?		
2. Answer yes for any of the following: was it for the receipt of virtual currency as payment for goods or services provided; • The receipt or transfer of virtual currency for free (without providing any consideration) that does not qualify as a bona fide gift; • The receipt of new virtual currency as a result of mining and staking activities; • The receipt of virtual currency as a result of a hard fork; • An exchange of virtual currency for property, goods, or services; • An exchange/trade of virtual currency for another virtual currency; • A sale of virtual currency; and • Any other disposition of a financial interest in virtual currency	_____	_____
Economic Impact Payments		
3. Did you receive an Economic Impact Payment (EIP) in 2021 of $1,400/$2,800 for MFJ? Or $1,400 for dependents?		
4. If so, did you receive Letter 6475? Please provide copy.	_____	_____
Advanced Child Tax Credits		
5. Did you or your spouse receive Advanced Child Tax Credits during 2021?		
6. If so, did you receive Letter 6419? Does letter agree to amounts you received? Please provide copy.	_____	_____
Gifts		
1. Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, etc., with a total (aggregate) value in excess of $15,000 to any individual?	_____	_____
Foreign Matters		
1. Were you or your spouse a grantor or transferor for a foreign trust, have any interest in or a signature or authority over a bank account, securities account or other financial account in a foreign country?	_____	_____
2. Did you or your spouse own any foreign financial assets?	_____	_____

Per **PHONE CALL** between _____ (CLH staff) and _____ (Client Name) _____ (Date)

Per **EMAIL** between _____ (CLH staff) and _____ (Client Name) _____ (Date)