Stevenson Tax and Accounting, Inc.

2205 Point Blvd. \* Suite 125 \* Elgin, IL \* 60123

Cell: 847-337-0794 Fax: 224-230-4998

Email: [karen@karenmstevenson-ea.com](mailto:karen@karenmstevenson-ea.com)

www.karenmstevenson-ea.com

Dear Client:

Thank you for choosing our firm. We know that you have a choice when it comes to tax preparation, and we appreciate your business and trust in us.

We are near the intersection of 90 and Randall, in the Lundstrom Insurance office building.

For everyone’s safety, we are not meeting with clients in-person at this time.

You can instead upload documents to our secure portal or mail to us using the PO, UPS, or FedEx rather than coming in person. If we feel we are missing documents or have questions, we will contact you.

You can also *drop off documents through the mail slot in the suite door* at any time, as convenient for you. We will retrieve your documents and be in touch.

When your returns are completed, we’ll upload to the portal for signing or mail documents to you.

We look forward to working with you!

Best Regards,

Karen M. Stevenson, EA, MBA

**Tax Organizer -** or instead use the online one in your portal

Please bring all W-2 forms, 1099s, 1098s, and all other tax forms.

**How much did you receive for stimulus #3? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**How much did you receive in Advance Child Tax Credit payments?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

One-time requirement: Provide a birth certificate or SSN card for each dependent.

Did all dependents live with you for more than 6 months of the year? Y N

Did you provide more than 50% of your child(ren)’s support? Y N

**Did you buy, sell, trade, or otherwise acquire cryptocurrency in 2021? \_\_\_\_\_\_\_\_\_\_\_**

Provide a copy of your driver’s license.

Did you have Obamacare health insurance? If yes, please provide the 1095-A.

Did you buy a new car? Sales tax paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Provide all 1098-T forms for all college students.

If you own your home: What county: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ PIN \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Provide 1098 for mortgage interest and property tax paid.

Medical expenses out of pocket over 7.5% of income? Total amount: \_\_\_\_\_\_\_\_\_\_

Amount of charitable donation by check or credit card ***for non-itemizers***, up to $300 (single) or $600 (married)\_\_\_\_\_\_\_\_\_\_

Total charitable giving via check or credit card, if over $300 or $600: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total non-cash charitable donations e.g. Goodwill, AmVets, etc.: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If the total of non-cash donations is over $500, please list:

Date of each donation, to which charity given and the value of each donation

If you had *self-employment income*, please provide:

All 1099 forms and total income and all expenses, broken down by category

If you *rented a property to others*, please provide:

Total income and all expenses, broken down by category

Does your child(ren) go to private school? Provide the statement of tuition paid.

Public school: Provide school name and registration fees paid for each child.

Bank routing and account number for direct deposit:

Routing #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bank Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dates and amounts of quarterly estimated payments paid to the IRS and to IL.

or mail a check?\_\_\_\_\_\_\_\_\_\_\_\_\_\_