2022 TAX APPOINTMENT & QUESTIONNAIRE (for 2021 Taxes)

Dear client,

Your tax appointment for this year is:

Day________Date___________Time_______am\pm

This document digitally available at mckaytax.com (tools & checklists)

McKay TAX & ACCOUNTING

My Office_______Mail________Portal _______ Drop Off _______

If you are unable to keep this appointment date kindly give us as much advance notice as possible so that your time can be filled by someone else.

OPTIONS FOR SHARING YOUR TAX INFORMATION WITH US IN ORDER TO COMPLETE YOUR TAX RETURN SAFELY

- **(preffered) Use our secure portal to upload your fillable questionnaire and tax documents to complete your taxes remotely. $10 discount with questionnaire. Please contact us before your appointment date if you choose this option.**
- Mail your information to me and I can complete your taxes and mail back to you
- After arriving at your scheduled appointment time call us and we will immediately secure your information and complete your taxes in our office with phone call(s) while you wait in your vehicle.
- Meet with us for your appointment if in our office.

HOW TO ENSURE THAT YOU ARE GETTING THE MAXIMUM POSSIBLE DEDUCTIONS & CREDITS ALLOWED BY LAW:

- Please read and complete the "Information Checklist" (right) and all other parts of the questionnaire that apply before the appointment date.
- Bring a list of all other tax questions to the appointment.

TO OPT OUT OF RECEIVING TEXT MESSAGES PLEASE CONTACT US

TAX PREPARATION FEES:

- Minimum fees including state are $80 or $70 if filing through the portal **(with a completed questionnaire).** Fees for dependents of taxpayers are $30. The average fee is usually between $100 and $130 but can vary by the number of extra forms and their complexity. See the complete list of form prices at www.mckaytax.com.
- You may pay with cash, check, Visa, Master Card or Venmo

If you have any questions or need to change your appointment, please call (801) 731-1857. If I am not in the office then please leave a message and I will return your call promptly.

Thanks for your business.

Richard V McKay E.A

Rebecka P McKay

McKay Tax and Accounting
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intuit QuickBooks. Certified ProAdvisor Desktop

MasterCard VISA

www.Mckaytax.com

RV Software Inc.

Please have the following available for our appointment;

- Last years tax return (Only if done by someone else)
- **All W-2's, 1099's, k-1's, 1098's, IRS letter 6419 (Advance Child Tax Credit)**
- Records of all other incomes and expenses
- Escrow statements of any property bought, sold or financed
- **Form 1095-A if applicable**
- **State ID (Drivers License)**

YES	NO	Unsure	INFORMATION CHECKLIST		
☐	☐	☐	Did you have any other sources of income other than from the W2s, 1099s, K1s, and other income information that you have presented ?		
☐	☐	☐	Do you use a home equity loan other than to buy or improve your home? If so please provide principal balances during the year.		
☐	☐	☐	Has your marital status, address, or dependents changed last year?		
☐	☐	☐	Did you support anyone other than your own children or does anyone live with you who is not your dependent?		
☐	☐	☐	Do you have any losses to carry forward from previous years?		
☐	☐	☐	Did you sell any securities or has any become worthless during 2021?		
☐	☐	☐	Did you pay interest on a mobile home, motor home, or boat that has basic living accommodations?		
☐	☐	☐	Did you buy, sell, or refinance real estate? Bring Hud statements.		
☐	☐	☐	Did you contribute Cash/Check to a charity even if not itemizing?		
☐	☐	☐	Do you use a portion of your home as an office for business purposes on an ongoing and exclusive basis (Only if you have a small busines)?		
☐	☐	☐	Do you anticipate any **substantial** changes in income, deductions, or tax withholding for the coming year?		
☐	☐	☐	Did you pay higher education expenses for you or your dependent this year? (Tuition, Fees, Books, and interest). List names and amounts on page two, section 6 under "Education Credits". **Bring form 1098-T**		
☐	☐	☐	Does anyone owe you money which has become a bad debt? (There must be true debtor/creditor relationship)		
☐	☐	☐	Last year did you or your spouse purchase health insurance from the Marketplace to help you reduce your monthly health insurance costs? Marketplace data is reported on **Form 1095-A**.		
☐	☐	☐	Did you receive alimony?	Amount	
☐	☐	☐	Did you pay alimony SS #	Amount	
			If you contribute to a retirement plan that was not a deduction from you wages then enter below. Information for retirement plans deducted from your wages are accounted for in your W2		
☐	☐	☐	Did you contribute to a regular IRA ?	Amount	
			Did you contribute to a Roth IRA ?	Amount	
☐	☐	☐	Do you have a health savings account? Bring Form 1099-SA		
☐	☐	☐	In 2021 did you have interest in a foreign account ?		
☐	☐	☐	At any time during 2021, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency?		

INCOME 2021

Section 1: PERSONAL INFORMATION

☐ **CHECK IF NO PERSONAL CHANGES FROM LAST YR & WE DID YOUR TAXES**

If there are no changes it is not necessary to fill in personal data section EXCEPT DEPENDENTS INCOME & AGE.

Full Names(both)

Address

Home Phone	**Work Phone**	email		
	Soc. Sec. Number	**Occupation**	**Cell Phone**	**Date of Birth**
You				
Spouse				

Section 2: DRIVERS LICENSE

	License num	**State**	**Issue date**	**Expiration Date**
You				
Spouse				

Section 3: DEPENDENTS

PLEASE LIST ALL BIRTH DATES & INCOME

Full Name	**Relation-Ship**	**Date of Birth**	**Income**	**Social Security Number**	**Months lived in home 2021**

TOTAL HOUSEHOLD RESIDENTS IN 2021

Section 4: ALL INTEREST AND DIVIDENDS RECEIVED

Interest Source	**Amount**	**Dividend Source**	QU	**Amount**

Section 5: SALE OF STOCKS / SECURITIES

Description	**Date Acquired**	**Date Sold**	**Cost/ Basis**	**Selling Price**

Section 6: OTHER INCOME

State tax refunds received in 2021		Tips received-(unreported only)	
Unemployment compensation - bring statements		Hobby income	
Social Security/RR Tier 1 - bring statements		Other income(prize,award,gambling) bring info	

DEDUCTIONS 2021

Section 7: MEDICAL EXPENSES

Prescription drugs					
Health insurance premiums /Medicare					
Doctors/Dentists					
Hospitals / Emergency Care/X-ray/Lab					
Medical equipment					
Glasses / Contacts /Hearing Aids					
Medical Miles (16¢)					
Reimbursements for amounts abov		Cafeteria Plan Payments			

Section 8: TAXES (Utah car fees not deductible)

State Tax Paid with 2020 taxes in 2021	Real Estate Residence
Sales Tax on Auto,Truck, Boat, Motorcycle	Real Estate Tax Land
Auto/Truck county tax (NOT valid in Utah)	Other Real Estate

Section 9: INTEREST PAID

Mortgage Interest (1st, or 2nd to improve HM		Investment Int	
Mortgage Interest (1st, or 2nd to improve HM		**Note: Interest only for buying or improving home**	
Mortgage Insurance (1st/2nd to improve HM)			

Section 10: CONTRIBUTIONS

Donee	Amount:	Donee	Amount
Donee	Amount:	Donee	Amount
Donee	Amount:	Donee	Amount

Charitable Miles (14¢)			
Donated Property Description			
Cost			
Fair Market Value			

Section 11: EDUCATION CREDITS (must have form 1098-T)

Student Name	**College year fresh,soph,Jr,Sr**	**Tuition/ Fees/ books**	**Loan Interest**
			5

Section 12: CHILD CARE EXPENSES

Child/Dependent Care Expenses(under 13) or Physically Handicapped

Care Provider	**Address**	**S.S.#/E.I.#**	**Amt. Paid**

Employer Provided Child Care Payments (Cafeteria Plan)

Section 13: ESTIMATED TAXES PAID

1st Quarter Date		**1st Quarter Amount**	
2nd Quarter Date		**2nd Quarter Amount**	
3rd Quarter Date		**3rd Quarter Amount**	
4th Quarter Date		**4th Quarter Amount**	

BUSINESS INCOME and EXPENSES 2021

Section 14: SELF EMPLOYED INCOME/EXPENSES

Product or Service					
Did you actively participate in the business this year		YES		NO	
Did you file a Schedule C for this business before		YES		NO	
Gross Income		Returns			
Beginning Inventory		Purchases			
Personal Use Items		Ending Inventory			

Advertising		Rent(other)		
Bad Debts		Repairs/Maint.		
Bank Charges		Supplies		
Commissions/fees		Taxes/License		
Cleaning		Travel		
Depletion		Meals		
Dues/Publications		Medical Ins.		
Employee Benefits		Utilities		
Insurance		Wages		
Business Interest		Job Credit		
Interest(mortgage)		Other:		
Legal/Professional		Other:		
Profit Sharing		Other:		
Rent(equip/veh)		Other:		

Section 15: VEHICLE EXPENSES-EMPLOYEE or SELF EMPLOYED

	Veh 1 Desc:		Veh 2 Desc:	
Date placed in service				
Total mileage for year				
Business miles for year				
Distance from home to work				
Cost/Fair Market Value on date place in service				
Do you have another personal vehicle(Y/N)	YES		NO	
Do you have written evidence of business miles(Y/N)	YES		NO	

Section 16: VEHICLE ACTUAL EXPENSES (Not required for 56¢/mile)

	Vehicle 1 Desc:		Vehicle 2 Desc:	
Gas/Oil/Repairs/Wash				
Tires/Batteries etc..				
Insurance/License				
Taxes				
Interest				
Lease Payments				
Other:				

Section 18: OFFICE IN THE HOME SELF EMPLOYED

Office Square Ft		Home Square Ft			
Home Interest		Home taxes		Heating	
Electricity		Insurance		Rent	
Office Repairs		Office Maint.		Other	

Section 17: RENTAL INCOME/EXPENSES

Property	Address
A	
B	
C	

Did you or a member of your family use any of these properties for personal purposes for the greater of fourteen(14) days or 10% of the total days rented at a fair rental value?	YES		NO	
Did you actively participate in the operation of these activities this yr.	YES		NO	

Properties	A	B	C
Income			
Advertising			
Auto/travel			
Cleaning/Maintenance			
Commissions			
Insurance			
Legal/Professional			
Mortgage Interest			
Other Interest			
Repairs			
Supplies			
Taxes			
Electricity			
Heat			
Water/Garbage			
Phone			
Yard Care			
Other:			

Income from Partnerships/S Corp/Estates/Trusts: Attach K-1's

Section 18: TRANSACTIONS NOT REPORTED ON FORM 1099

Description	Date Acquired	Date Sold	Receipts	Cost

Section 19: SECURITIES AND PROPERTY SOLD

Description	Date Acquired	Date Sold	Receipts	Cost

Section 20: ASSETS PURCHASED for BUSINESS/RENTAL

Description(and which business)	Date Purchased	Cost