ACCOUNTING PLUS LLC -TAX DROP OFF FORM PERSONAL TAX INFORMATION FOR **TAX YEAR 2021**

For Office Use/ Date Received

- 1. Did we do your 2020 return **YES or NO** (If no please include a copy & copies of SS cards & DL)

		es, when:		1				_
	TAX	PAYER				SPOU	SE	
	STATE:			ZIP:				
	TOWN OF	:		SCHOOL	OL DIST:			
	DE	PENDENT	'S					
Relationship (Son, Daughter, etc.)	Date of Birth	Social Sec	urity Number	Months Lived with you in 2020	Claiming as Dependent		Claiming for EIC	Had Incom over \$2000
CHI		ENDENT C					I	
	Address		Social Sec	curity # or E	IN		Amount Paid	
	Fſ	DUCATIO	<u> </u>					
	Tuition			als	(Fuesh			
(include fo	(include form 1098-T)				(Fresni	men, S	opnomore, E	ttc.)
			nulus?					
				1				
	- ROULING MILITINA			Account Number				
	CHI College (include fo Chaughter, etc.) CHI College (include fo Checkir	STATE: TOWN OF Relationship (Son, Daughter, etc.) CHILD & DEPI Address EL College Tuition (include form 1098-T) I you receive from Fee (\$1400 in March of 2021)	TOWN OF: Contact Date of Birth etc.	STATE: TOWN OF: DEPENDENTS Relationship (Son, Daughter, etc.) Part of Birth Social Security Number Social Secu	STATE: ZIP: TOWN OF: SCHOOL DEPENDENTS Relationship (Son, Date of Birth etc.) CHILD & DEPENDENT CARE CREDIT Address Social Security Number in 2020 CHILD & DEPENDENT CARE CREDIT Address Social Security # or E EDUCATION College Tuition (include form 1098-T) Books & Materials I you receive from Federal Stimulus? (\$1400 in March of 2021) DIRECT DEPOSIT INFORMATION Checking or Routing Number	STATE: ZIP: TOWN OF: SCHOOL DIST DEPENDENTS Relationship (Son, Daughter, etc.) Date of Birth Social Security Number Lived with you in 2020 CHILD & DEPENDENT CARE CREDIT Address Social Security # or EIN EDUCATION College Tuition (include form 1098-T) Books & Materials (Fresh) I you receive from Federal Stimulus? (\$1400 in March of 2021) DIRECT DEPOSIT INFORMATION Checking or Routing Number According to the control of the contr	STATE: ZIP: TOWN OF: SCHOOL DIST: DEPENDENTS Relationship (Son, Daughter, etc.) CHILD & Date of Birth CHILD & DEPENDENT CARE CREDIT Address Social Security Number CHILD & DEPENDENT CARE CREDIT Address Social Security # or EIN College Tuition (include form 1098-T) Books & Materials (Freshmen, S Special Security # or EIN College Tuition (include form 1098-T) DIRECT DEPOSIT INFORMATION Checking or Routing Number Account N Checking or Routing Number	STATE: ZIP: TOWN OF: SCHOOL DIST: DEPENDENTS Relationship (Son, Date of Birth etc.) CHILD & DEPENDENT CARE CREDIT Address Social Security # or EIN Amount Paid EDUCATION College Tuition (include form 1098-T) Books & Materials (Freshmen, Sophomore, E Lived with you in 2020 CHILD & DEPENDENT CARE CREDIT Address Social Security # or EIN Amount Paid EDUCATION College Tuition (include form 1098-T) Lived with you in 2020 Freshmen, Sophomore, E Lived with you in 2020 Claiming as Dependent or EIC Claimi

INCOME

Wages/ Salary	Attach W2 or 1099	Interest Income	Attach 1099-INT
Dividend Income	Attach 1099-DIV	Partnership/ Trust/ Estate	Attach Schedule K-1
Pension & IRA Income	Attach 1099-R	Property Sold	Attach detail and/ or Settlement Statement/ 1099-S
Social Security	Attach SSA-1099	Rail Road Retirement	Attach RRB-1099
Unemployment	Attach 1099-G	Gambling Winnings	Attach W2-G
Self-Employment/ Farming	Income/ Expenses	Rental Property	Income/ Expenses
Stock/ Bond Sales	Attach 1099-B	Cancellation of Debt	Attach 1099-C
Other Income	Attach 1099-MISC	Cryptocurrency Sale	1099-В
Alimony Received		Child Support Received	

HOUSING EXPENSES

Real Estate Tax paid in 2021:	Residence: _	Other:					
Mortgage Interest:		include the 1098 form					
Rent Paid Monthly:X	(# months	_ include rent certificate for homestead	Was Heat included: Yes or No				
Did you have	Market Di	ace Insurance? If Yes we nee	od a 1095-Δ				
-		ible if greater than 10% of gross in					
Long Term Care:		Health Insurance or Medicare Supplement Premiums out of pocket:					
Prescription Medications out of pocket:		Medicare Premiums:					
Medical Mileage:		Doctor/ Dental/ Hospital out of pocket only:					
Medical Supplies:		Smoking Cessation:					
Lodging:		Labs, X-Rays Medical Equip:					

MISCELLANEIOUS DEDUCTIONS - Itemized deduction for miscellaneous itemized deductions subject to the 2% floor are no longer allowed. Examples include investment expenses, unreimbursed employee business expenses, and tax preparation fees.

OTHER DEDUCTIONS/ CREDITS

			Taxpayer			Spouse		
IRA Contributions								
Roth or Tradi		Roth or Traditio	onal – Amount \$		Roth or Traditional – Amount \$			
Alimony Paid								
HSA Contributions								
Charitable Contribution (Include documentation					Charitable Miles (\$0.14 per mile)			
Win/ Loss Gambling			you received a		esidential Energy Cre			
Statement	W2-G	for winni	nings (only If Solar, Wind or Geothermal)					

ESTIMATED TAXES PAID

	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
Date				
Federal				
State				