

**VERY IMPORTANT TAX LETTER –
PLEASE READ
INFORMATION FOR TAX YEAR 2021:**

- Similar to last year, our office building will be closed to foot traffic. Your options to get your tax information to us include:
 - Deposit in locked drop box at the office
 - Mail to: Derrick Hamm, 3497 Industrial Dr York, PA 17402
 - Email: dhamm@daymarkfinancial.com

- Most adults and children received stimulus money in 2021. You must tell us the exact amount you received (even if it's zero). We will not start the preparation of your taxes without this information (see more detailed information in attached letter).

- If you received any portion of the Advanced Child Tax Credit, you must tell us the total amount received. We will not start the preparation of your taxes without this information (see more detailed information in attached letter).

- You must inform us if you own or traded cryptocurrency or any other digital assets.

- **New for this year**, if you want your refund direct deposited (which we recommend), **we need a new voided check from you** (writing “same as last year” will not work this year).

DERRICK HAMM
INCOME TAX PREPARATION SERVICES, INC.
3497 INDUSTRIAL DRIVE
YORK, PA 17402

January 2022

Dear Valued Tax Client,

Happy New Year! The following information will help you to provide us with all the details we need to prepare your taxes. Please contact us with any questions or concerns.

1. Stimulus payment from 2021

If you received an amount from the government in 2021, we must know the exact amount. These amounts can be found in the following places: **Notice 1444-C** and/or **Letter 6475**, or check your bank account statements.

*Giving us the incorrect amount will make your taxes incorrect

2. Advanced Child Tax Credit (ACTC)

If you received the ACTC, you must tell us the total amount you received. These amounts can be found in the following places: **Letter 6419**, check your bank account statements from July – December, or go to: www.IRS.gov and click “View Your Child Tax Credit Payments”.

*Giving us the incorrect amount will make your taxes incorrect

3. Cryptocurrency/Digital Assets

It is required to disclose to the IRS if you own or trade cryptocurrency and/or digital assets. If you own it, please inform us, as that is a ‘yes or no’ question on your taxes.

*If you trade it, we need documentation to calculate capital gains/losses.

You will receive your completed taxes and instructions in the mail as you did last year.

We wish you all a happy and healthy 2022. Thank you for your continued business.

Sincerely,

Derrick, Christina, Emily, Denise, Ann, and Tammy

DERRICK HAMM
PHONE: 717-840-0749

TAX PREPARER
FAX: 717-840-0754

2021 Tax Questionnaire

New Client Referred by: _____

(Please fill out both sides of questionnaire and bring it in with your tax documents)

How much was your stimulus payment? (If \$0, please put \$0) \$ _____

How much did you receive for the Advanced Child Tax Credit (if applicable) \$ _____

Do you own or trade cryptocurrency or other digital assets? Yes No

Taxpayer Name: _____ SSN: _____

Occupation: _____ DOB: _____

Preferred method of contact: Phone Email

Email: _____ Phone: _____

Driver's License #: _____ Issue Date: _____ Exp. Date _____

Did you add money to an IRA or Roth IRA (not including work-related 401k)? Yes No Amount \$ _____

If you attended college in 2021, did your employer reimburse you for any expenses? If so, how much? _____

Covered by health insurance through The Marketplace/Obamacare during 2021? Yes No - If **YES** please include Form 1095-A

Do you work in York City? Yes No If unsure, please provide work address _____

Spouse's Name: _____ SSN: _____

Occupation: _____ DOB: _____

Preferred method of contact: Phone Email

Email: _____ Phone: _____

Driver's License #: _____ Issue Date: _____ Exp. Date _____

Did you add money to an IRA or Roth IRA (not including work-related 401k)? Yes No Amount \$ _____

If you attended college in 2021, did your employer reimburse you for any expenses? If so, how much? _____

Covered by health insurance through The Marketplace/Obamacare during 2021? Yes No - If **YES** please include Form 1095-A

Do you work in York City? Yes No If unsure, please provide work address _____

Address: _____

Did you move in 2021? Yes No When? _____ Buy Sell (Settlement sheets needed for purchase and sale)

Current Twp/Boro _____ School district _____

Previous Address/Twp/Boro/ _____ School district _____

Please attach a voided check for direct deposit

Refund: Mail check Direct Deposit (must attach voided check)

Dependents – please put dependent information on next page.

(Returning clients, please list only new dependents. If you are no longer claiming a dependent, please write their name in the section below; new clients, please list all dependents. If your child attended college in 2021, please provide their 1098-T and all non-tuition expenses.)

1. Name _____ DOB: _____ SSN: _____

College student? Yes No Amount of any out-of-pocket non-tuition expenses: _____

Relationship _____

2. Name _____ DOB: _____ SSN: _____

College student? Yes No Amount of any out-of-pocket non-tuition expenses: _____

Relationship _____

3. Name _____ DOB: _____ SSN: _____

College student? Yes No Amount of any out-of-pocket non-tuition expenses: _____

Relationship _____

4. Name _____ DOB: _____ SSN: _____

College student? Yes No Amount of any out-of-pocket non-tuition expenses: _____

Relationship _____

5. Name _____ DOB: _____ SSN: _____

College student? Yes No Amount of any out-of-pocket non-tuition expenses: _____

Relationship _____

Any additional tax related information (including dependents you NO LONGER claim):

2021 TAX CHECKLIST

Use this checklist as your personal guide to compile your 2021 tax documents. If you have a form that is not listed below, feel free to include that as well. Please call with any questions. Thank you.

New Items / Commonly Overlooked Items

- 2021 Tax Questionnaire:** Please fill out the entire Questionnaire and include it with your tax information. *We will not prepare your taxes without this form.*
- Notice 1444-C and/or Letter 6475** which has your stimulus amount
- Letter 6419** which has your Advanced Child Tax Credit amount
- Charitable Contributions** are usually a benefit *only* if you itemize your deductions. However, in 2021, if you gave to charity, the IRS is allowing up to a \$300 deduction per adult. Please include your contribution receipts with your tax information.
- Refunds:** After we e-file your taxes, you can go to www.irs.gov to track your refund.

Personal Data

- Dates of birth (including spouse and children) and Social Security #s
– unless on file from previous year
- A voided check if you would like your refund directly deposited into your account.
- PREPRINTED LOCAL TAX RETURN FORM, IF APPLICABLE (for PA residents only)

Employment and Income Data

- W-2 forms for this year from ALL employers
- Pensions and annuities: Form 1099-R
- Retirement plan distribution: Form 1099-R
- Social Security Statement: SSA-1099
- Partnership and trust income: Form K-1
- Gambling and lottery winnings: Form W2-G
- Tax refunds: Form 1099-G
- Unemployment compensation: Form 1099-G
- Other

Homeowner/Renter Data

- Residential address(es) for this year (including school district and township or borough)
- Mortgage interest: Form 1098 (1st & 2nd mortgages, lines of credit)
- Real estate taxes paid (include receipts if taxes are not escrowed)
- Settlement sheet if bought home **OR** refinanced in the past year (Also called HUD-1 or Closing Disclosure)

Financial Assets

- Interest income statements: Form 1099-INT
- Dividend income statements: Form 1099-DIV (our office **DOES NOT** receive this information from Invesco, SEI, etc.)
- Proceeds from broker transactions: Form 1099-B (including cost basis information)
- CRYPTOCURRENCY** – if trading, need documentation to calculate gain or loss

Financial Liabilities

- Student loan interest paid: Form 1098-E

Expenses

- Gifts to charity
- Education expenses (tuition and other expenses, student's grade, scholarship information), etc.: Form 1098-T
- Childcare expenses (include provider ID or Social Security number and address)
- Health Savings Accounts (HSA info), 1099-SA, and 5498-SA
- Teaching expenses (if your occupation is "teacher")

Self-employment Data

- 1099-Misc's and K-1's on all partnerships and other businesses
- Documentation for business-related expenses including mileage if applicable

Deduction Documents

- IRA, Roth IRA and other retirement plan contributions
- Medical expenses and mileage (if substantial)
- 529 Plan contributions (PA residents only)

Other

- Any form you are unsure of
- Any piece of mail labeled "Important Tax Information"
- Form 1095-A (If applicable)
- Driver's License info (write on Questionnaire)
- IRS IP PIN, if applicable
- Notice 1444-C and/or Letter 6475, which has your stimulus amount
- Letter 6419, which has your Advanced Child Tax Credit amount