



15655 W. Roosevelt St.  
Suite 101  
Goodyear, AZ 85338

**Please mark each box with a "Y" for Yes or "N" for No.**

	*Did you receive, sell, send, exchange, or acquire any financial interest in virtual currency? (Bitcoin/Crypto Currency)*
	Did your marital status change?
	Can you be claimed as a dependent by another tax payer?
	Did you receive any dividends or interest? Forms 1099DIV, 1099INT, Broker Statement
	Did you receive income from Estates, Trusts, Royalties, Partnerships, Corporations, Farms, or Annuities?
	Did you receive any income from rent? (rental, home, business)
	Did you receive unemployment income? Form 1099G
	Did you receive any other 1099s not already accounted for above?
	Did you receive funds from or contribute funds to a retirement account (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc)?
	Did you transfer, roll over or convert funds from one retirement plan to another retirement plan?
	Did you, your spouse or a dependent incur any tuition expenses for secondary education?
	Did you have any debts canceled or forgiven?
	Did you pay or receive alimony payments?
	Did you receive medical insurance from the market place?
	Did anyone in your household not have health insurance for any part of the year? (Form 1095)
	Did you pay for any medical, dental or vision coverage not through your employer?
	Did you have any medical miles?
	Do you own a business?
	Was your home used for any business activities?
	Did you buy or sell any rental properties?
	Did you buy or sell your home or other assets?
	Do you own your home?
	Did you refinance your home?
	Did you incur any losses due to a federally declared disaster?
	Did you have any foreign income or pay any foreign taxes?
	Did you receive money from, have money in, or have control of a foreign account?
	Did you pay sales tax on any big ticket item? (Cars, Trucks, Trailers, Boats, RVs, Motor Homes)
	Did you make any charitable cash contributions or donate any non-cash items?
	Did you have any charitable miles?
	Did you pay estimated taxes?
	Did you receive any communications from the IRS or Arizona Department of Revenue?
	Did you receive the first and/or second stimulus check? If so, how much did you receive. (Form 1444)

Name: \_\_\_\_\_

Signature: \_\_\_\_\_