

**WILLIAMS & ASSOCIATES A.C.**  
Information 2021

**TO AVOID DELAYS ON YOUR RETURN-PLEASE MAKE SURE THE NAMES AND SOCIAL SECURITY NUMBERS ARE EXACTLY AS THEY APPEAR ON YOUR SOCIAL SECURITY CARDS. PLEASE HAVE YOUR IDENTIFICATION READY. WE WILL MAKE COPIES OF YOUR DRIVER'S LICENSE & SOCIAL SECURITY CARDS.**

Taxpayer Information				Spouse Information			
Name: _____				Name: _____			
Last	First	MI		Last	First	MI	
Preferred Name: _____				Preferred Name: _____			
Social Security #: _____				Social Security #: _____			
Occupation: _____				Occupation: _____			
Date of Birth: _____				Date of Birth: _____			
E-Mail Address: _____							
Best Contact # _____				Best Contact # _____			
Cell Phone #: _____				Cell phone #: _____			
Address: _____							
City: _____		State: _____		Zip Code _____			
Date of Death: _____				Date of Death: _____			

**Marital Status as of December 31, 2021**

<input type="checkbox"/> Single		Check if your spouse passed away within the past 2 years.
<input type="checkbox"/> Married Filing Jointly		Check if Disabled
<input type="checkbox"/> Head of Household		Year of Disability: _____
<input type="checkbox"/> Married Filing Separately		

Dependent Information								
First Name	Last Name	Social Security # <small>** MUST HAVE CARD PRESENT</small>	Date of Birth <small>Mo/Day/Year</small>	Relationship to You	# of months lived with you in 2021	Eligible for EIC <small>Yes/No</small>	Child Care Expense <small>Yes/No</small>	Qualified Education Expenses <small>Yes/No</small>

**Additional Information**

**\*\* IMPORTANT - Any Changes since we did your taxes last year? ( Example: new child, new home,retired?) If yes, please list / describe below:**


If you are to receive a refund this year, how would you want to receive it?	Check or Direct Deposit	<b>Please circle one</b>
If Direct Deposit, Has your bank information changed since last given to us?	Yes or No	

\*\* Be sure to let the tax preparer know to avoid refund delays



**Additional Information Continued**

**Check all that apply to you, your spouse and/or dependents.**

<input type="checkbox"/> Earn interest/dividends on a checking/savings or other account?	<input type="checkbox"/> Sell timber, land or other real estate?
<input type="checkbox"/> Receive unemployment compensation ?	<input type="checkbox"/> Required to repay a homebuyer credit?
<input type="checkbox"/> Receive Social Security Income?	<input type="checkbox"/> Itemize deductions last year?
<input type="checkbox"/> Contribute to an IRA or other retirement plan?	<input type="checkbox"/> Own a business?
<input type="checkbox"/> Receive funds from a retirement plan?	<input type="checkbox"/> Own a corporation, partnership, trust, ect?
<input type="checkbox"/> Assessed an early withdrawl penalty?	<input type="checkbox"/> Pay child care expenses?
<input type="checkbox"/> Sell Stock?	<input type="checkbox"/> Employed as a teacher?
<input type="checkbox"/> Receive or pay alimony?	<input type="checkbox"/> Have Health Insurance? <b>Market place or Other</b>
<input type="checkbox"/> Make mortgage payments?	<input type="checkbox"/> Have you received a <b>1095A</b> or <b>1095B</b> ?
<input type="checkbox"/> Own rental property?	<input type="checkbox"/> Attended school in 2021?
<input type="checkbox"/> Own a farm?	<input type="checkbox"/> Made student loan payments?
<input type="checkbox"/> Receive royalties? ( Gas, etc )	<input type="checkbox"/> Paid tuition for you or a dependent?

Who referred you to us? We would like to thank them!