



PLEASE FILL THIS OUT BEFORE YOUR APPOINTMENT

We must receive this to prepare your taxes!

☎ 801.564.1486

✉ taxexpert102@gmail.com

🌐 www.negretesaccounting.com

Returning Client

2496 N 500 W, UT, 84414

PERSONAL INFORMATION

Name

Taxpayer Phone

Spouse Email

Street address, city, state, and ZIP

Marital Status at end of 2021

Married

Married filing separately

Single

Widow(er)* *If spouse died in 2021 enter the date of death: / /

Have there been any significant changes in the information described in this section within the last year?

Refund Direct Deposit

Bank Name Routing # Account # Checking Savings

DEPENDENTS

Who are you claiming this year?

Dependent's first and last name	Months in home	Full-time student (Y/N)
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
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DAYCARE

Y N

Did you pay any daycare expenses that were not reimbursed through work?

Child Name: Amount Paid: \$

Child Name: Amount Paid: \$

Energy

Y N

Did you get solar installed in your home? Amount: \$

Did you get new windows, exterior doors, furnace, AC or hot water heater? Amount: \$

Call us with questions at [801.564.1486](tel:801.564.1486) or email us at taxexpert102@gmail.com

CONTINUE ON REVERSE SIDE

HEALTH INSURANCE

Y N

- Did anyone in your household have health insurance through the government marketplace?
(If YES then you must bring your 1095-A statement available at healthcare.gov)
- Did you have a Health Savings account during the year?
- Did you use any funds from it? (This is found on your 1099-SA from the HSA.) Amount: \$
- Did you ever use your Health Savings account to pay for things that were not qualified expenses?

EDUCATION

Y N

- Did you pay any student loan interest in 2021? How much? Taxpayer: \$ Spouse: \$
- Did you pay any out of pocket expenses for tuition, books, or fees for school? (Must be post-high school.) How much?
(If any tuition was paid, please bring the 1098-T tuition statement. You can get this directly from your online portal at the university or school.)
- Taxpayer: \$ Spouse: \$ Dependent: \$ Dependent: \$

INCOME

Total number of W-2s from jobs Taxpayer: Spouse:

Total number of 1099-R retirement statements Taxpayer: Spouse:

Y N

- Did you receive income from Social Security? (Bring pink and white SSA statement.)
- Did you collect any unemployment? (Bring 1099-G from jobs.utah.gov)
- Did you sell any stock during the year? (Bring 1099-B.)
- Did you earn any interest or dividends this year? (Bring 1099-INT and 1099-DIV.)
- Did you have any self-employment income during the year? (Bring profit and loss.)
- Did you have any rental income during the year? (Bring profit and loss.)
- Did you have any other income that's not listed above? List here:
- Did you sell any Bitcoin or any other virtual currency during the year?

ADJUSTMENTS

Y N

- Did you receive any alimony during the year? Amount: \$ Date of Divorce: / /
- Did you pay any alimony during the year? Amount: \$ Date of Divorce: / /
- Did you contribute to an IRA or ROTH IRA? Taxpayer: \$ Spouse: \$
- FOR EDUCATORS: Did you have any expenses that were not reimbursed? Taxpayer: \$ Spouse: \$

DEDUCTIONS*

***PLEASE COMPLETE WITH YOUR MONETARY AMOUNTS.**

Tax laws have changed and even if you don't have enough to "itemize" you may still be able to use some of these on your 2021 taxes.

CHARITABLE DONATIONS:

Monetary Donations: \$ Material "Stuff" Donations (DI, etc; **garage sale value): \$

PERSONAL HOUSES

of loans on your house (includes HELOCS, 2nd mortgages, etc.):

of personal properties you own (not rentals):

Total Property Tax Paid on Personal Houses: \$

Total Mortgage Interest Paid on Personal Houses: \$

Total Mortgage Insurance Premiums paid on Personal Houses: \$

MEDICAL EXPENSES

Total paid on medical and dental insurance premiums that are NOT paid through your employer: \$

Total out of pocket medical and dental expenses (incl. doctor bills, co-pays, etc.) Taxpayer: \$ Spouse: \$

Total number of medical miles driven: Taxpayer: Spouse:



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