

Tax Year Questionnaire

YES I acknowledge that it is my responsibility to provide Next Step Tax LLC with all relevant documents to prepare my tax return. I will upload them into my BOX account and will notify Next Step Tax once all documents are uploaded.

My top 3 expectations of Next Step Tax LLC are:

Describe any significant personal or financial event(s) that occurred in the tax year.

IN THE 2021 TAX YEAR, DID YOU:

- | | | |
|-----|----|---|
| YES | NO | Have a business Name: _____
LLC DBA S-Corp Partnership |
| YES | NO | Own, Buy or Sell a Home? Include associated expenses. |
| YES | NO | Own, Buy or Sell Rental Property? Include associated expenses. |
| YES | NO | Receive a Schedule K-1 from a real estate or financial investment? |
| YES | NO | Have income from another state (W-2, 1099, Trust, Royalty, etc.)? |
| YES | NO | Buy or Sell Crypto Currency? If YES, download .CSV file from account. |
| YES | NO | Have foreign income, investments, or bank accounts? |
| YES | NO | Have an investment account (Robin Hood, Schwab, Fidelity etc.)? |
| YES | NO | Make estimated tax payments? Total \$ _____ |
| YES | NO | Receive a 1099-G for unemployment benefits? |
| YES | NO | Receive a 1099-NEC for self-employed income? |
| YES | NO | Have documentation (spreadsheet) of self-employed expenses? |
| YES | NO | Receive a W-2? |
| YES | NO | Receive a 1099-DIV for dividend income? |
| YES | NO | Receive a 1099-INT for interest earned from a bank or other source? |
| YES | NO | Have under or not-insured property damage from Snowmageddon greater than \$1,000? |

YES NO Receive Child Tax Credit Payments (CTC)? Total \$

YES NO Receive \$1,400 Stimulus Check(s) in Jan 2021? Total \$

A YES answer means I agree to upload the appropriate document(s) into my BOX account so my tax return is accurate and complete.