Warren Office
(586) 751-6060
Fax (586) 751-1533
www.hkglcpa.com

Heemer Klein & Company, PLLC

Accounting and Tax Services

2021 TAX DATA SHEET

Richmond Office
(586) 727-5145
Fax (586) 727-5062
www.hkglcpa.com

	TAXPAYER	TAXPAYER (SPOUSE)
NAME		
SOC. SEC. #		
DRIVERS LIC. #		
LIC ISSUE DATE		
LIC. EXP. DATE		
OCCUPATION		
DATE OF BIRTH		
HOME ADDRESS		CITY, ST, ZIP
TELEPHONE #	HOME ( ) -	CELL ( ) -
	CELL ( ) -	
EMAIL ADDRESS(ES)		SCHOOL DISTRICT -

NAME (FULL)	SOC. SEC. #	RELATIONSHIP	BIRTH DATE	MONTHS AT HOME	CHILD CARE EXPENSES

CHILDREN AND / OR DEPENDENTS – USE BACK IF NEEDED

BANK ACCOUNT INFORMATION FOR DIRECT DEPOSIT OF REFUND

Providing this information will significantly decrease the time required to receive your refund!

Bank Name: ______________________ Account Type Chking_____Savings_____Joint? ____

Routing Number ______________________ Account Number ______________________

BRING THIS TAX INFORMATION WITH YOU

- All W2's from your employer
- All Interest and Dividend Income Statements (1099 INT, 1099 DIV, 1099B Statements) from banks, credit unions, and brokerage firms
- Social Security statements (SSA-1099)
- Real Estate tax bills for 2021(paid or not) and for previous years paid in 2021.
- Any other income statements for miscellaneous income, alimony, prizes, state & local tax refunds, lottery winnings (W2G), etc.
- Tuition information for each college student (1098-T) and a list of all related college expenses
- If this is your first year with Heemer Klein, we need a copy of your 2019 and 2020 tax returns to best prepare your 2021 return.
- If you were in the health care marketplace and received a government subsidy, you should have received a form **1095-A.** We must have this form to reconcile your premiums.

Small and New Business Start-up Specialists!

2021 Estimated Tax Payments Paid (Taxpayer must complete, if applicable)

	Federal Estimates		State Estimates		City Estimates	
	Amount	Check# & Date	Amount	Check # & Date	Amount	Check # & Date
4/15/21						
6/15/21						
9/15/21						
1/18/22						

Tax Updates

- Please see our website www.hkglcpa.com **for the latest tax updates.**

Schedule A Itemized Deduction Worksheet:

The following information will be required if you plan on itemizing your deductions. The standard deductions are as follows: married filing **jointly ($25,100)**, married filing separately and **single filers ($12,550)**, and **head of household ($18,800).**

Please be advised that paid bills and cancelled checks claimed as deductions must be kept for a period of at least three years to comply with tax regulations and audit procedures. DO NOT CLAIM as deductions any bills that have not actually been paid within the calendar year of 2021.

Medical	**Contributions**	**Taxes**
Dentist -	**Cash or Checks -** All Contributions must have both statements and canceled checks to qualify	***This category is limited WITH all State and Local Income Taxes.***
Doctors -	Church -	Home Property Taxes -
	College / University -	2nd Home –
Hospital -	Other -	Land -
Ins. Reimbursement -		License Tabs -
Lodging Expenses -		
Long Term Care Premiums -	**Non Cash -** If over $500 must have detailed list and value of donation with names and addresses	**Interest Expenses**
Medial Insurance – other than Medicare -	Salvation Army/Goodwill -	Home Mortgage –
Miles Driven	Other -	*Home Equity -
Prescription Drugs	Other -	**Land Contracts -
Other (glasses etc) -	Charitable Mileage -	

*__For Home Equity Loan__ – deductible only if used to purchase or improve home

For Land Contracts - We need the **name, address, and Social Security number of the owner

Additional Information We May Need

*Alimony – paid (or received) -	
Date Divorce agreement executed -	
**Child Care expenses (12yrs/under)-	
Gambling losses -	
IRA Contributions made before April 15, 2022 -	
Did you contribute to a Health Savings Acct (HSA)? **(Do NOT include employer's contributions.)**	
Did you receive an Economic Impact Payment? If so, what was the total amount?	

*Must have name and SS# of recipient **Must have name/address/ID# of caregiver

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