

DROP-OFF INTERVIEW FORM FOR TAX YEAR 2021

FILING STATUS: SINGLE MARRIED FILING JOINTLY MARRIED FILING SEPARATELY HEAD OF HOUSEHOLD QUALIFYING WIDOW(ER)

NAME:	SPOUSE'S NAME:
ADDRESS: _____	ADDRESS: _____
City State Zip	City State Zip
TELEPHONE NUMBERS: _____	TELEPHONE NUMBERS: _____
EMAIL:	EMAIL:

DEPENDENTS: *If the dependent is new, we will need a copy of birth certificate and Social Security Card.*

Did you obtain your health insurance through the Market Place? YES NO

At any time during 2021, did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currency (bitcoin/crypto)?
 YES NO

Did you receive stimulus payments? YES NO If YES, how much _____

Did you receive child tax money for 2021 ? _____ If yes, how much did you receive per month? _____

Any other major changes we should know about to complete your 2021 income tax return?

Please note upcoming changes: If you sell or have any transactions on sites such as PayPal, Venmo, Cashapp, Zelle, etc, there are government changes to the law beginning in 2022. If you generate more than \$600.00 in transactions, you will receive a 1099 form next year. Please be aware of this change and keep a detailed record of your transactions for tax season next year.

- Check box if you would like your fees deducted from your refund. By doing this, you are allowing Mason Financial Services to utilize Fee Collect on your behalf.
- I choose not to have my fees deducted from my return. I choose to pay my fees at the time of service, for completion of my tax return. I understand that Mason Financial Services requires all fees paid at the time of service.
- If you would like any refunds deposited to your account directly, please provide the following information and attach a copy of a voided check:

Bank Account # _____ Routing # _____ Checking Savings

CLIENT SIGNATURE