

HANTZ FAMILY OFFICE TAX QUESTIONNAIRE - TAX YEAR 2021

1. Did you receive the Advanced Child Tax Credit?
 No
 Yes – Provide IRS Letter 6419 or go to [IRS.gov/payments/view-your-tax-account](https://www.irs.gov/payments/view-your-tax-account)
 N/A
2. Did you receive a 2021 stimulus payment?
 No
 Yes – Provide IRS Letter 6475 or go to [IRS.gov/payments/view-your-tax-account](https://www.irs.gov/payments/view-your-tax-account)
3. Did you make estimated quarterly tax payments?
 No
 Yes – Provide details
4. Did you buy/sell/exchange any cryptocurrency?
 No
 Yes – Provide 1099 and/or detailed Excel transaction summary
5. Did you install any energy efficient property on your primary residence?
 No
 Yes – Provide invoice and energy star documentation
6. Do you have a financial interest or signature authority over a foreign bank account?
 No
 Yes – Provide additional details upon request
7. Did you use Health Savings Account (H.S.A.) funds to pay qualified medical expenses?
 No
 Yes – Provide 1099-SA tax document
8. Did you pay childcare expenses for your dependent children?
 No
 Yes – Provide year-end statement from childcare provider
9. Did you contribute to your state sponsored Qualified Tuition Program/529 (ex. MESP)?
 No
 Yes – Provide 12/31 statement
10. Did you receive unemployment benefits?
 No
 Yes – Provide 1099-G
11. Did you make cash donations to a qualifying charity?
 No
 Yes – Provide total amount of cash donations
12. Do you want your refund direct deposited and/or your balance due direct debited?
 No
 Yes – Provide bank account information and last 4 of account number
13. Do you want your balance due direct debited?
 No
 Yes – Provide bank institution and last 4 of account number
14. Did you participate in any sports betting *or* online gambling?
 No
 Yes – Provide the 1099 and or W-2G

| Quarter | Federal | State | Local | Date Paid |
|---------|---------|-------|-------|-----------|
| First | | | | |
| Second | | | | |
| Third | | | | |
| Fourth | | | | |
| Total | | | | |