

**INCOME TAX QUESTIONNAIRE**  
**RUSSELL M. KHEDERIAN**  
**CERTIFIED PUBLIC ACCOUNTANT**  
26 Brighton Street, Belmont, MA 02478  
TEL: 617-484-1816 FAX: 617-484-3467  
E-MAIL ADDRESS: russ@russkcpa.com  
WEB SITE: www.russkcpa.com

2021

2021

Taxpayer's Name \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

	<u>Occupation</u>	<u>D.O.B</u>	<u>Best Contact Number</u>	<u>Email Address</u>
Taxpayer's Information	_____	_____	_____	_____
Spouse's Information	_____	_____	_____	_____

DEPENDENTS:

<u>Name</u>	<u>Soc. Sec. No.</u>	<u>D.O.B.</u>	<u>School student for 5 months?</u>	<u>Does dependent live at home?</u>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____

**MAKE SURE THAT ALL NAMES REPORTED MATCH SOCIAL SECURITY RECORDS**

**PLEASE RESPOND TO THESE FOUR QUESTIONS:**

1. Did you receive your 3<sup>rd</sup> economic stimulus payment during 2021? Yes \_\_\_ No \_\_\_  
The 3<sup>rd</sup> stimulus payment did not begin until March 17, 2021 and the maximum payment was \$1,400 per person. Amount received \$ \_\_\_\_\_
2. Do you wish to designate \$3.00 for the Presidential campaign fund? Yes \_\_\_ No \_\_\_
3. Did you make charitable contributions using cash-check-credit card? Yes \_\_\_ No \_\_\_  
If yes, be sure and fill out the contributions section of page 10.
4. At any time in 2021 did you buy, sell or exchange virtual currency? Yes \_\_\_ No \_\_\_

To the best of my knowledge and belief, the information included in this questionnaire is true, correct, and complete.

\_\_\_\_\_  
Signature of Taxpayer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Spouse

\_\_\_\_\_  
Date

**W-2 INCOME**

**\*BRING ALL W-2'S TO OUR MEETING\***

**TAXPAYER:**

1. Name of Employer # 1: \_\_\_\_\_

2. Name of Employer # 2: \_\_\_\_\_

**SPOUSE:**

1. Name of Employer # 1: \_\_\_\_\_

2. Name of Employer # 2: \_\_\_\_\_

**INTEREST INCOME**

(NOTE: BOX # REFERS TO BOX # ON 1099 INT FORMS)

**TAXABLE:**

**ATTACH ALL 1099'S**

<u>Payer:</u>	<u>Box 1 Interest</u>	<u>Box 2 Early w/d</u>	<u>Box 3 US Savings</u>	<u>Box 4 Fed w/h</u>	<u>Box 11 Bond Prem</u>	<u>Box 12 Bond Prem T'S</u>
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

**NON-TAXABLE:** (such as municipal bond interest)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

At any time in 2021 did you have a financial interest in or signature authority over financial accounts with an aggregate value of \$10,000 or more located in a foreign country? Yes \_\_\_\_\_ No \_\_\_\_\_

**If yes, you must file FinCen Form 114 by April 15, 2022 with the United State Treasury.**

