

Hurst, Kelly & Company LLC
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513-234-0977
www.hurstkelly.com

Important Tax Year 2021 Information

Please check our website **www.hurstkelly.com** for the most current information regarding our business processes and office hours.

Please review page 1 of the tax organizer and verify the accuracy of the telephone number(s) and email address(es) that we have on file for you and update as necessary. Please also review and complete the **yes or no** questions on page 4 of the tax organizer. You may also complete any other sections of the organizer that you like.

In order to have your returns prepared, reviewed and e-filed by the April 15, 2022 due date, we need to have received all of your tax information by March 15, 2022. If we haven't received all your information by this time, we may need to extend your tax return.

Tax information can be provided to our office via four methods: (1) mailing your tax information to our office in the enclosed envelope, (2) depositing it in our secure drop box located just outside our office door (for 24/7 access), (3) dropping it off in-person with our office administrative assistant during office hours, or (4) uploading it to our secure portal at <https://hurstkelly.smartvault.com>.

If you would like your 2021 tax return extended, contact our office at 513-234-0977. Individual tax returns (Form 1040) must be filed or extended by April 15, 2022. Business tax returns (Forms 1065 and 1120S) for December 31, 2021 year-ends, must be filed or extended by March 15, 2022. Please contact us prior to the return due date if you would like an extension filed. **We must receive a request from you in order to process and transmit the extension request.**

Taxing authorities require current driver's license or state ID information to process electronically filed returns. Please provide us with driver's license/ID information for each person in your household that our office is preparing tax returns for.

	<u>Taxpayer</u>	<u>Spouse (if any)</u>
License/ID - Full Name	_____	_____
License/ID - Issuing State	_____	_____
License/ID - Number	_____	_____
License/ID - Issue Date	_____	_____
License/ID - Expiration Date	_____	_____

Did you receive any advance child tax credit payments from the Internal Revenue Service in 2021?

Yes (if yes, complete the table below) No

<u>Date Received</u>	<u>Amount Received</u>
July, ____ 2021	\$ _____
August, ____ 2021	\$ _____
September, ____ 2021	\$ _____
October, ____ 2021	\$ _____
November, ____ 2021	\$ _____
December, ____ 2021	\$ _____

Did you receive the 3rd stimulus payment from the Internal Revenue Service in 2021 – the base amount of this round of stimulus was \$1,400 per person and began being paid as of March 12th, 2021?

Yes (if yes, complete the table below) No

<u>Date Received</u>	<u>Amount Received</u>
_____, 2021	\$ _____

If you have a Health Savings Account (HSA) and distributed any funds from the account during 2021, you will need to provide to our office a Form 1099-SA to accurately prepare your tax returns. Note that while some banks mail this form, most banks no longer mail these, and as such, you will need to log into your HSA account, and download and print the 2021 Form 1099-SA.

If you (or a dependent of yours) was enrolled in a college or university at any time during 2021, the respective college or university that billed tuition in 2021 will generate a Form 1098-T that our office needs to accurately prepare your 2021 return. These forms are not mailed and must be retrieved by logging into your account at the college or university. Please download and print any such Forms 1098-T and provide them to our office along with a listing of any other post-secondary educational expenses you paid in 2021.