



DISALVO & ASSOCIATES, PLLC

CERTIFIED PUBLIC ACCOUNTANTS - BUSINESS ADVISORS

Credit Card Authorization Form

I, _____ authorize DiSalvo & Associates, PLLC to
charge my credit card # _____

for services performed.

\$ _____

One Time Charge

Recurring Monthly Fee on the 1st of every
month

Signature

Printed Name: _____ Title: _____

Expiration Date: _____

CVV CODE: _____

Billing Address: _____

Please fax this form to: (561) 659-1197

Thank you for your business!

Client Name: _____

2021 Individual Tax Preparation Questionnaire

1. Did you receive the Economic Impact Stimulus Payment Round #3? Yes or No If so, how much \$ _____
If you are not sure how much you received, please check here to avoid IRS refund discrepancies/return processing delays:
[Get My Payment | Internal Revenue Service \(irs.gov\)](https://www.irs.gov/coronavirus/get-my-payment)
<https://www.irs.gov/coronavirus/get-my-payment>
2. Amount of Advance Child Tax Credit payments from Letter 6419
Total Payments: \$ _____
Total # of qualifying children taken into account to determine advance amount from Letter 6419, box 2: _____
[Child Tax Credit Update Portal | Internal Revenue Service \(irs.gov\)](https://www.irs.gov/credits-deductions/child-tax-credit-update-portal)
<https://www.irs.gov/credits-deductions/child-tax-credit-update-portal>
3. Did you receive health insurance from the Marketplace? If so, please provide Form 1095-A. If you did not receive, please log in to Healthcare.gov to retrieve the tax document Yes or No
4. Did you acquire, trade or sell virtual currency? (Digital assets, such as bitcoin, Ethereum etc) Yes or No
5. Do you have any foreign bank accounts? Yes or No
6. Did you make any charitable donations? If you are taking standard deduction, maximum is \$300 for single/HOH and \$600 for MFJ \$ _____
7. If you are self-employed, how much was your 2021 health insurance premiums? (family coverage applies if not available through spouse's employer) \$ _____

