

DUANE JOHNSON GROUP LLC

27420 JEFFERSON AVENUE SUITE 104-A
TEMECULA, CA 92590

Phone: (951)244-6702 | Fax: (866)800-1548

January 20, 2022

Greetings,

I hope that this letter finds you safe and well. 2022 has brought some exciting new changes to our office with the biggest being our location change to our new office in Temecula. We are now located on the corner of Winchester and Jefferson next to Jack in the Box, in the Winchester Center complex. When you come, please park at the rear of the building and walk through the courtyard to the front of our office, right on Jefferson Ave.

The enclosed checklist will assist you in gathering information for your 2021 tax return. I want to highlight the top two items on the checklist, the first being the stimulus payment and the second being the Advanced payment of Child Tax Credit. It is important that you provide these letters with your tax return information. If you do not have these letters, you can find the information on the IRS website located at: www.IRS.gov/EIP.

We will not be pre-setting appointments this year. We are offering in person appointments for those that prefer to come in for a tax appointment however, if you are making your appointment before January 31, please call my home office at 760-515-6408. Appointments made after 1 February should be made via our Temecula office at 951-244-6702. In-person appointments will be limited so please call soon to guarantee a time slot.

We are also offering several other tax preparation options:

- Drop-off. You may drop your information off at our Temecula office. Please call before you stop by, so we can make sure someone is there to help you.
- Mail-in. You may mail your information to the Temecula office. If you choose this method, PLEASE SEND COPIES and keep your originals. Also, please be sure to include a phone number, so we can reach you.
- Secure file transfer. The secure file portal is available for safe file uploads of all your information. Please call the office to have your account set up, and we will send you an email with instructions on how to access the portal.

In order to maintain our rock bottom prices, we ask that you pay with either cash or check.

We appreciate your trust in our business. Contact our office at (951)244-6702 if you have any questions or need additional information.

Sincerely,

VALARIE LUKACSFFI EA
DUANE JOHNSON GROUP LLC

Checklist

Name: _____

SSN: _____

Checklist

This check list is provided to help you gather necessary information for us to prepare your 2021 income tax return. Return this list, along with the supporting documentation, to our office and let us know of any significant changes from your 2020 tax year.

Stimulus payment (Economic Impact Payment - IRS Notice 1444-C or Letter 6475)

Stimulus Payment _____

Advanced payment of Child Tax Credit (IRS Letter 6419)

Taxpayer _____

Spouse _____

State and city refunds and other government payments (Form 1099-G)

Unemployment compensation

Other Income (provide supporting documentation for income received for the following items)

Sale of assets or property

Cancellation of debt

Other income _____

Payments (provide supporting documentation for payments made for the following items)

Educator classroom expenses

Employee business expenses

Contributions to a Health Savings Account

Expenses related to work relocation

Alimony

Student loan interest

Tuition and fees for higher education

Expenses related to child or dependent care

Contributions to a Retirement Savings Account

Medical and dental expenses

Real estate taxes

Other state and local taxes

Mortgage interest

Investment interest

Cash contributions

Noncash contributions

Unreimbursed employee expenses

Investment expenses

Gambling losses

Other payments _____

2021 Tax Organizer Personal Information

Personal Information

	Name	SSN	Has IP PIN	Date of birth
Taxpayer				
Spouse				
Name of person to whom all information should be addressed, if not the taxpayer				
Street address, city, state, and ZIP				
	Occupation	Daytime phone	Evening phone	Cell phone
Taxpayer				
Spouse				
Taxpayer email				
Spouse email				

Filing status at the end of 2021

- Single Married Widowed - If widowed and your spouse died in 2021, enter the date of death _____
 Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2021? _____

Yes No

- Are you or your spouse blind?
 Are you or your spouse disabled?
 Are you or your spouse a full-time student?
 Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund?
 At any time during 2021 did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?
 If you were 18 years of age, or under 24 and a student, at the end of 2021, were you in foster care on or after turning 14 years of age and agree this status can be disclosed to the IRS?
 If you were 18 years of age, or under 24 and a student, at the end of 2021, were you homeless or at risk of becoming homeless and supporting yourself?
 Was your earned income in 2021 less than your earned income in 2019?
 If "Yes," enter the amount of your 2019 earned income. _____
 Did you receive the third stimulus payment (Economic Impact Payment or EIP) in 2021?
 If "Yes," enter the amount received for each taxpayer and provide Notice 1444-C or Letter 6475 from the IRS.
 Taxpayer _____ Spouse _____

Identification Information

Taxpayer's type of photo ID

- Driver's license State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Spouse's type of photo ID

- Driver's license State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Account Information for Deposits and Withdrawals

Name of bank	Bank routing number	Bank account number	Type of account		Use this account for	
			Checking	Savings	Deposits	Withdrawals

Appointment Information

Your 2021 appointment is scheduled for _____

Dependent and Other Information

Name: _____

SSN: _____

Dependent Information

First and last name SSN	Has IP PIN	Relationship	Months in home	Date of birth	Disabled	Full- time student	Childcare Expenses

List dependents required to file a return _____

Yes No

Did you receive advance payments of the Child Tax Credit from the IRS at any time from July through December 2021?

If "Yes," enter the amount each taxpayer received and the number of children taken into account to determine the amount received as shown on IRS Letter 6419, box 2. Or, provide Letter 6419 from the IRS.

Taxpayer _____

Spouse _____

If you were married last year and filed a joint return with your spouse, are you filing a joint return with the same spouse this year?

Child and Other Dependent Care Expenses

Name of care provider	Address	SSN or EIN	Amount Paid

Estimates

	Federal		Resident State		Resident City	
	Date paid	Amount	Date paid	Amount	Date paid	Amount
Overpayment applied from 2020	_____	_____	_____	_____	_____	_____
First quarter	_____	_____	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____	_____	_____