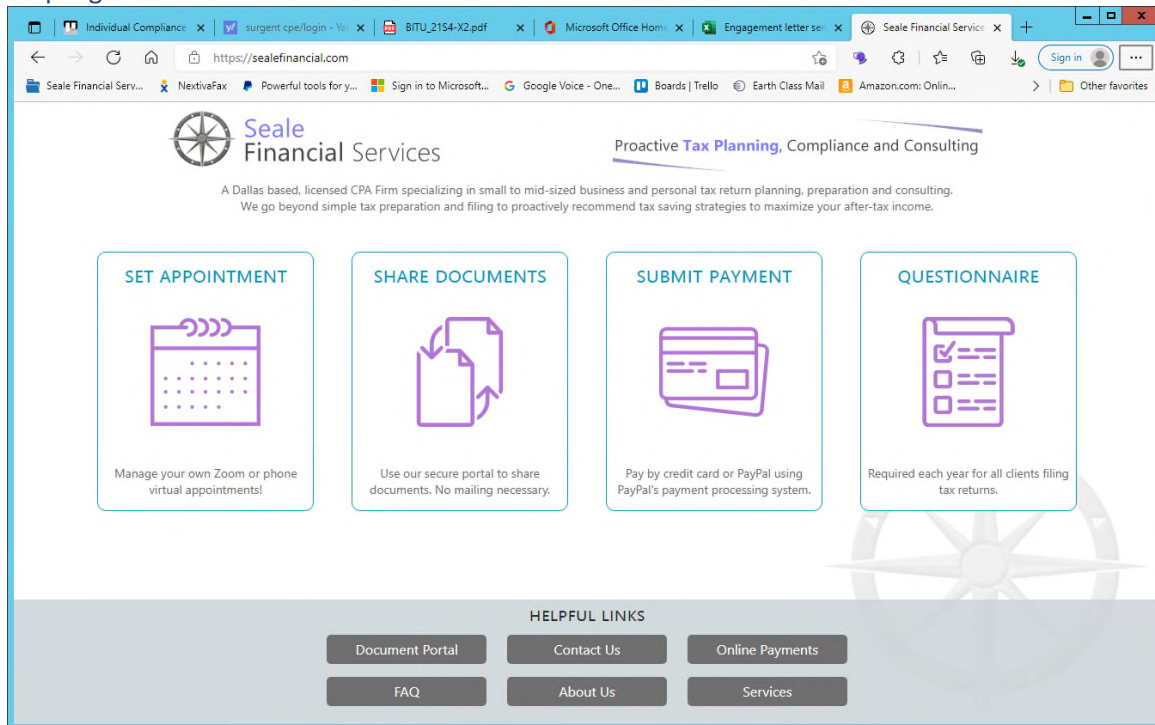


I wanted to provide instructions on completing the questionnaire. **We will not start on your file without this being complete.** Please keep this handy for when you are ready to complete that. If you need assistance or are unable to access your questionnaire after following these instructions, please let us know.

Step 1 go here:



Step 2: click on the questionnaire icon – be sure the personal button is blue

A screenshot of the 'Client Questionnaire - ID Verification' form on the Seale Financial Services website. The form is titled 'Client Questionnaire - ID Verification' and includes instructions: '*Enter the last name and last 4-digits of the primary tax payer's SSN. (This would be the first person listed on your tax return.)'. There are two tabs: 'Personal' (which is highlighted in blue) and 'Business'. Under the 'Personal' tab, there are two input fields: 'Last Name:' with the placeholder text 'e.g. Smith' and 'SSN Last 4:' with the placeholder text '1234'. At the bottom of the form, there is a red button labeled 'Lookup Account'.

Step 3 – enter the information for prompts and click look up account.

Step 4 – choose how to receive an access code and enter it once received.

The screenshot shows a web browser window with the URL <https://sealefinancial.com/>. The page features the Seale Financial Services logo, which includes a compass rose icon. Below the logo is a purple header for the "Client Questionnaire - ID Verification" form. The form contains instructions to enter the last name and the last 4-digits of the primary tax payer's SSN. There are two tabs, "Personal" and "Business", with "Personal" selected. The "Last Name" field contains the text "testing" and the "SSN Last 4:" field contains "6000". Under the heading "Send access code to...", there are two radio button options: "***-**-5248" and "dr**@savantsys.com". A red "Send Access Code" button is located at the bottom of the form.

Seale Financial Services

Client Questionnaire - ID Verification

*Enter the last name and last 4-digits of the **primary** tax payer's SSN.
(This would be the first person listed on your tax return.)

Client Information Personal Business

Last Name:

SSN Last 4:

Send access code to...

☐ ***-**-5248


☐ dr**@savantsys.com

[Send Access Code](#)

Individual Comp... x | surgent cpe/logi... x | BITU_2154-X2.p... x | Microsoft Office... x | Engagement lett... x | Seale Financial S... x | Seale Financial S... x

https://sealefinancial.com/cklist/logck

Seale Financial Serv... | NextivaFax | Powerful tools for y... | Sign in to Microsof... | Google Voice - One... | Boards | Trello | Earth Class Mail | Amazon.com: Onlin... | Other favorites

 **Seale**
Financial Services

Client Questionnaire - ID Verification

*Enter the first word of the business name and last 4-digits of the business EIN.
Do not include words such as "The" (e.g. The **Broadcast** Company)

*If you do not receive your code within 5 minutes, you may [request a new code](#)

Enter temporary access code

Access Code:


Verify Access Code

Step 5 – update your contact information if necessary.

Individual Comp... x | surgent cpe/logi... x | BITU_2154-X2.p... x | Microsoft Office... x | Engagement lett... x | Seale Financial S... x | Seale Financial S... x

https://sealefinancial.com/cklist/logck

Seale Financial Serv... | NextivaFax | Powerful tools for y... | Sign in to Microsof... | Google Voice - One... | Boards | Trello | Earth Class Mail | Amazon.com: Onlin... | Other favorites

 **Seale**
Financial Services

Welcome, Seale Financial Services Inc

*Enter the first word of the business name and last 4-digits of the business EIN.
Do not include words such as "The" (e.g. The **Broadcast** Company)

Verify primary contact info

*Both fields are required

Primary Email:

Primary Phone #:

Alternate contact (optional)

*Only complete this section for spouse contact information or if a secondary contact is needed on your account

Alternate Email:

Alternate Phone #:

Confirm Contact Info

Step 6 – complete the questionnaire for the current tax year.

The screenshot shows a web browser window with three tabs: 'Individual Compliance Workflow', 'Seale Financial Services - Quality', and 'Seale Financial Services - Client'. The address bar shows the URL 'https://sealefinancial.com/cklist/qlist'. The browser's toolbar includes a 'Sign in' button and a list of favorites. The page header features the Seale Financial Services logo, which consists of a compass rose icon and the company name. Below the header is a purple banner with the text '2021 Client Questionnaire'. A dropdown menu is set to '2021'. The main content area is titled 'C Drew Testing (6000)' and includes a bold instruction: '*ONLY check those items where your response would be "YES"'. The form is divided into two sections: 'Personal Information' and 'Dependent Information', each with a horizontal line separator. The 'Personal Information' section contains five questions with radio button options: 'Did your marital status change during the year?', 'Can you or your spouse be claimed as a dependent by someone else?', 'Did your address change during the year?' (with a sub-instruction to save the new address), 'Were you, your spouse, or any dependents a victim of identity theft?', and 'Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?' (with a sub-instruction to save Notice CP01A). The 'Dependent Information' section contains three questions with radio button options: 'Did you have any changes in dependents during the year?', 'Can another person qualify to claim any of your dependents?', and 'Did you receive advance payments of the Child Tax Credit (CTC) from the IRS at any time from July through December 2021?' (with a sub-instruction to provide Letter 6419 or go to the IRS website for documents).

Seale Financial Services

2021 Client Questionnaire

2021

C Drew Testing (6000)

***ONLY check those items where your response would be "YES"**

Personal Information

☐ Did your marital status change during the year?

☐ Can you or your spouse be claimed as a dependent by someone else?

☐ Did your address change during the year?

If checked, save new address to your portal account.

☐ Were you, your spouse, or any dependents a victim of identity theft?

☐ Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?

If checked, save Notice CP01A from the IRS to your portal account.

Dependent Information

☐ Did you have any changes in dependents during the year?

☐ Can another person qualify to claim any of your dependents?

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

If checked, provide Letter 6419 or go to <https://www.irs.gov/credits-deductions/child-tax-credit-update-portal> for documents.

Individual Compliance Wor x Seale Financial Services - C x Seale Financial Services - C x +

https://sealefinancial.com/ckl... Sign in

Seale Financial Serv... NextivaFax Powerful tools for y... Sign in to Microsoft... Other favorites

☐ May the IRS discuss your tax return with your preparer?

Foreign Tax Information

☐ Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?

☐ Did you receive a distribution from or were you a grantor of, or transferor to, a foreign trust?

☐ Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?

☐ Did you have any income from, or pay taxes to, a foreign country?

☐ Did you own property in a foreign country?

*You have (5) questions selected.

[Submit Questionnaire](#)

[Close and Logout](#)

click on submit questionnaire

Step 7 gather additional documents.



2021 Client Questionnaire

Thank you for completing your Questionnaire!
If you forgot something or need to make changes, you may always edit your Questionnaire at a later time or click below to edit now.

Based on your responses, you will need to provide the following documentation to [your portal account](#).

- Escrow, closing, and other pertinent documentation
- Paid receipt for property taxes
- Form 1098-Mortgage Interest
- Cash Donation Word/Pages document with Charity name and amount
- Non-cash Donation receipt from charity with charity address and donated date and value

You can search for and review IRS forms on their website at <https://www.irs.gov/forms-instructions>

I need to make changes

Close and Logout

click on close and logout.