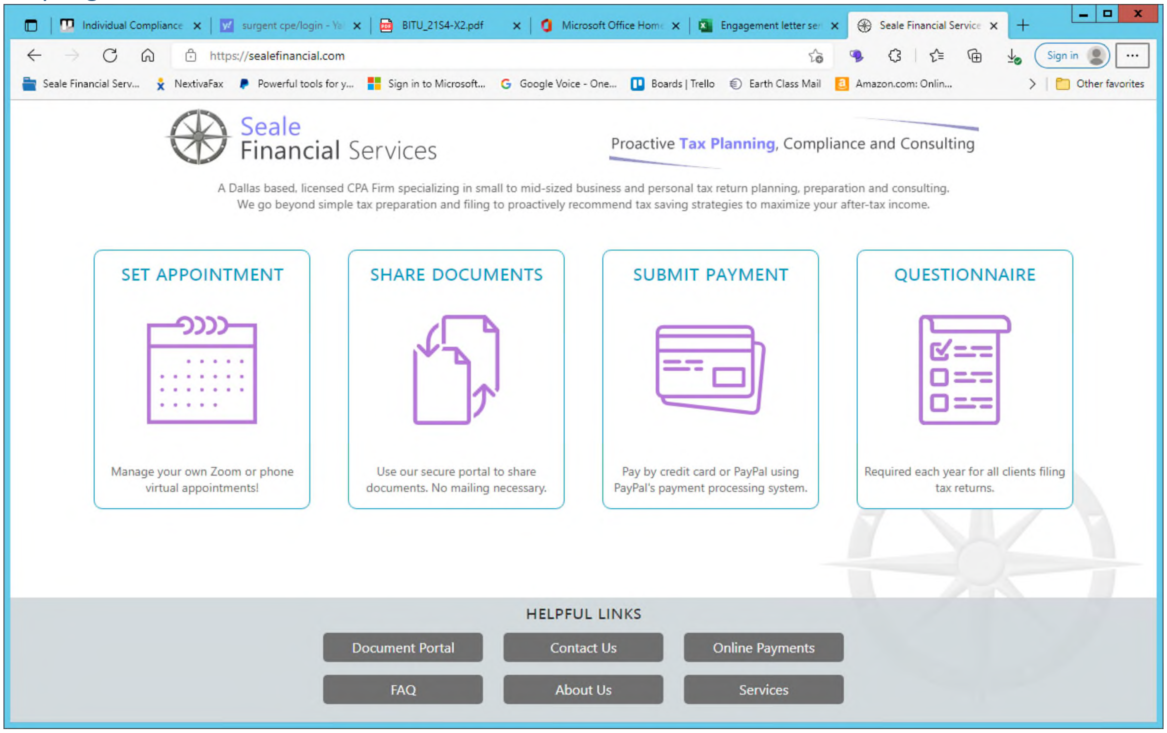
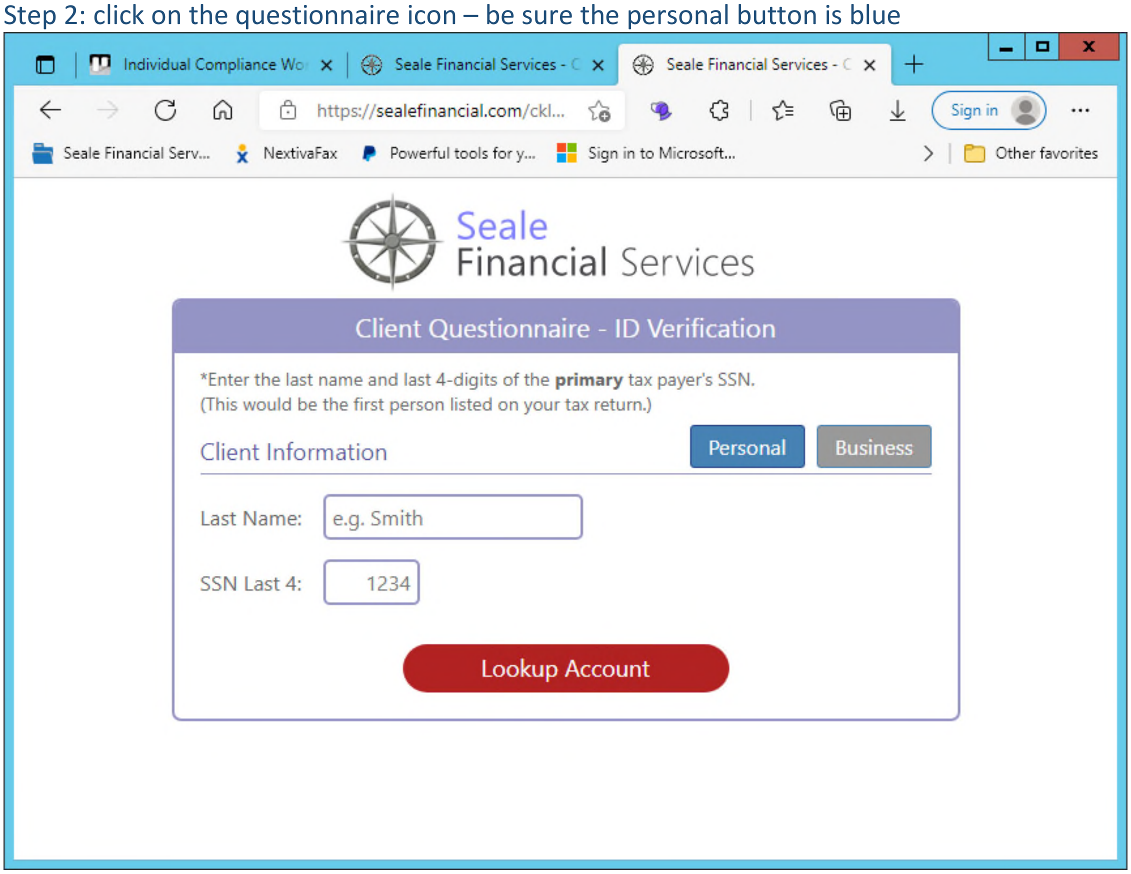
I wanted to provide instructions on completing the questionnaire. **We will not start on your file without this being complete**. Please keep this handy for when you are ready to complete that. If you need assistance or are unable to access your questionnaire after following these instructions, please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

Step 1 go here:

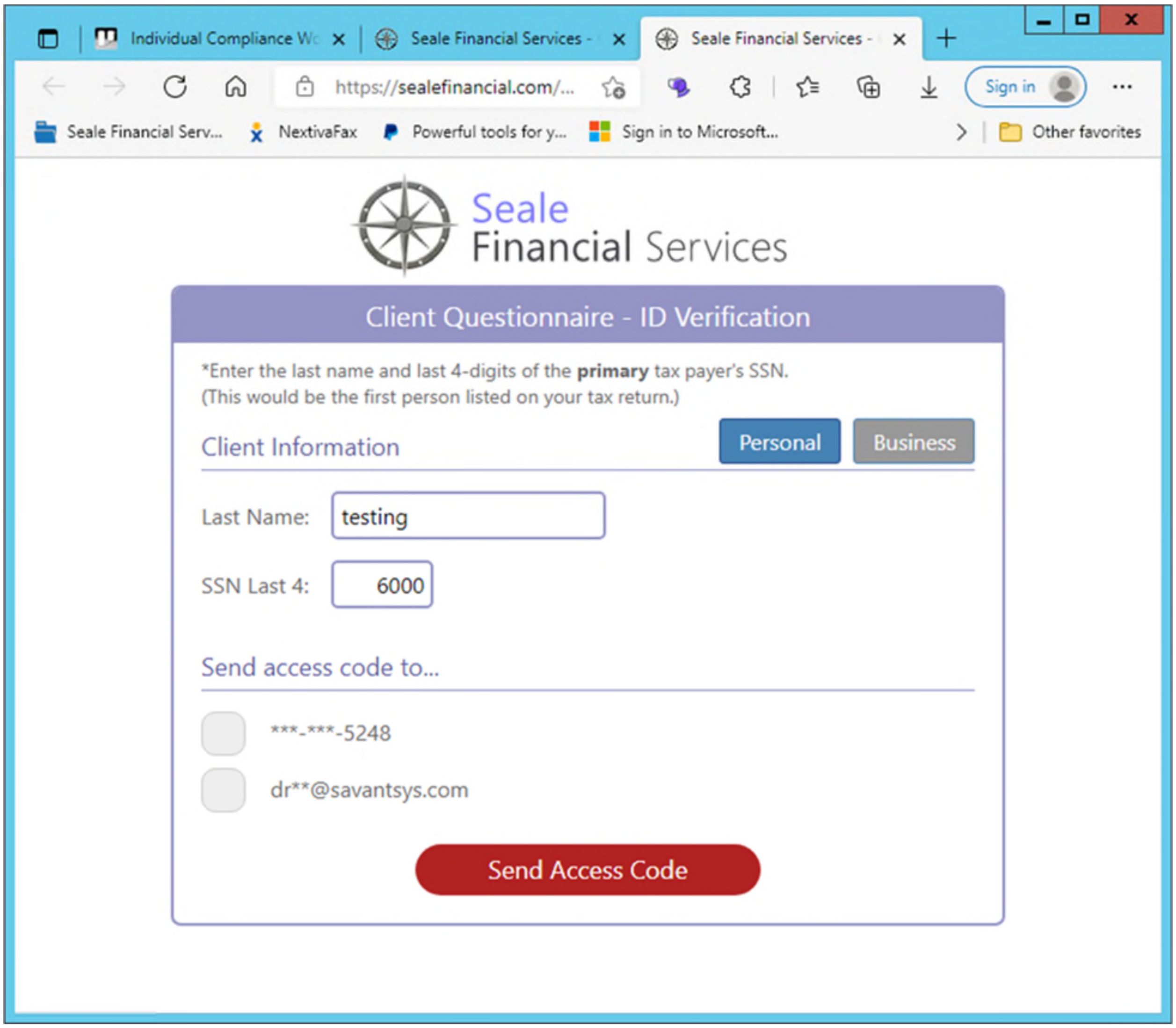


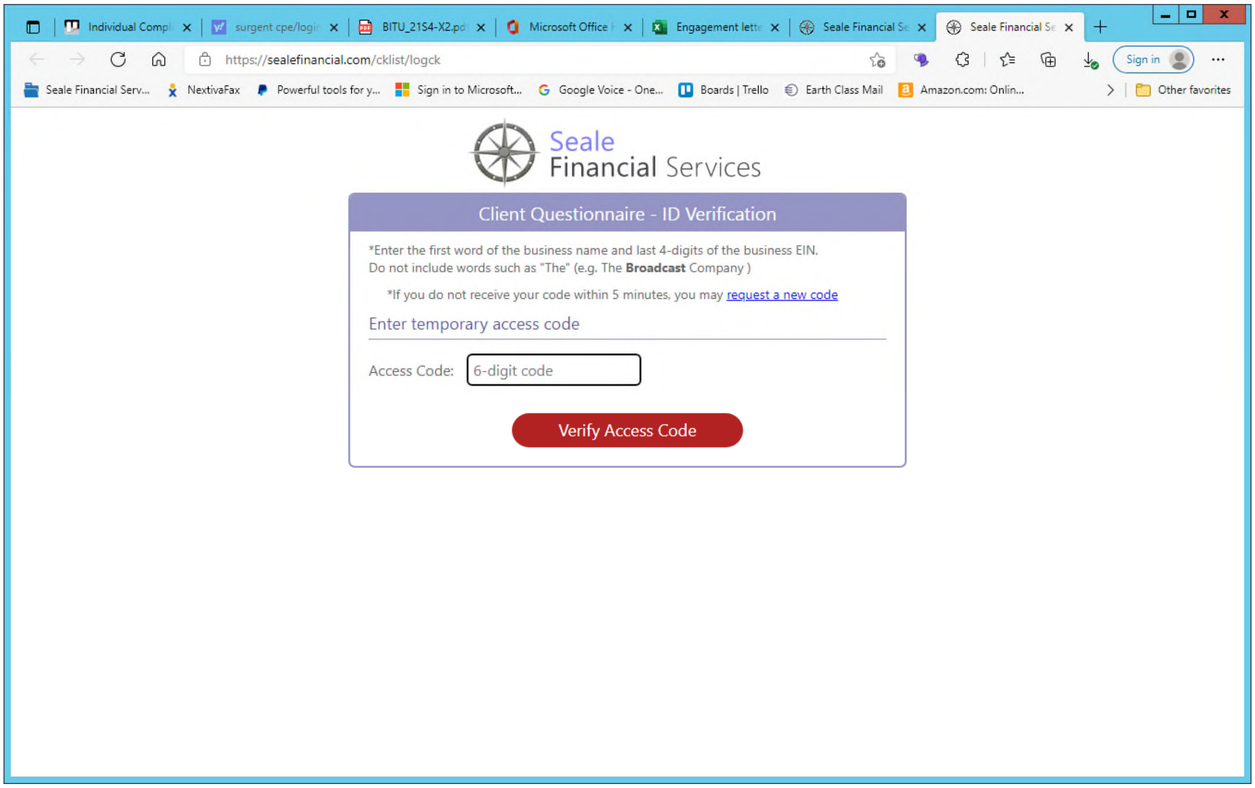
Step 2: click on the questionnaire icon – be sure the personal button is blue



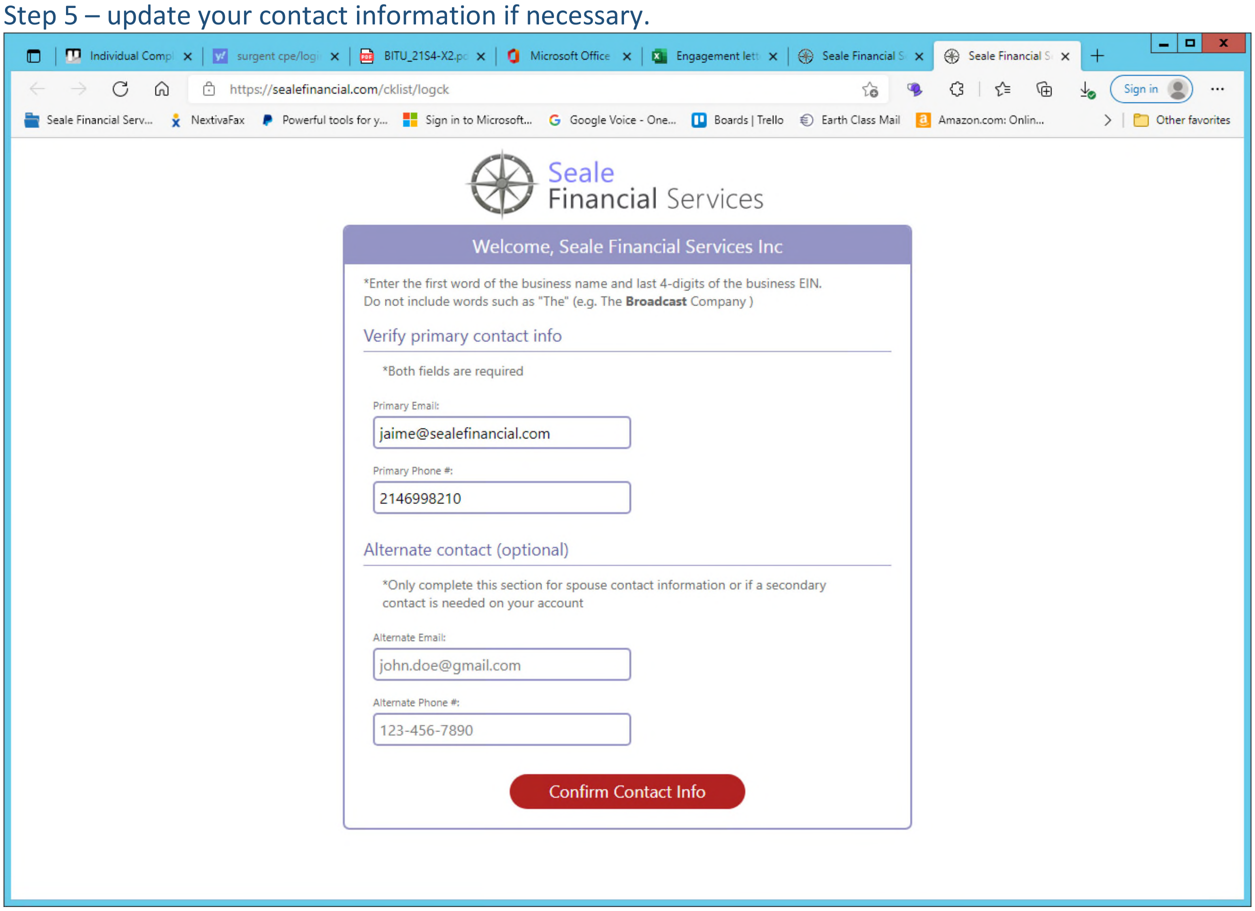
Step 3 – enter the information for prompts and click look up account.

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

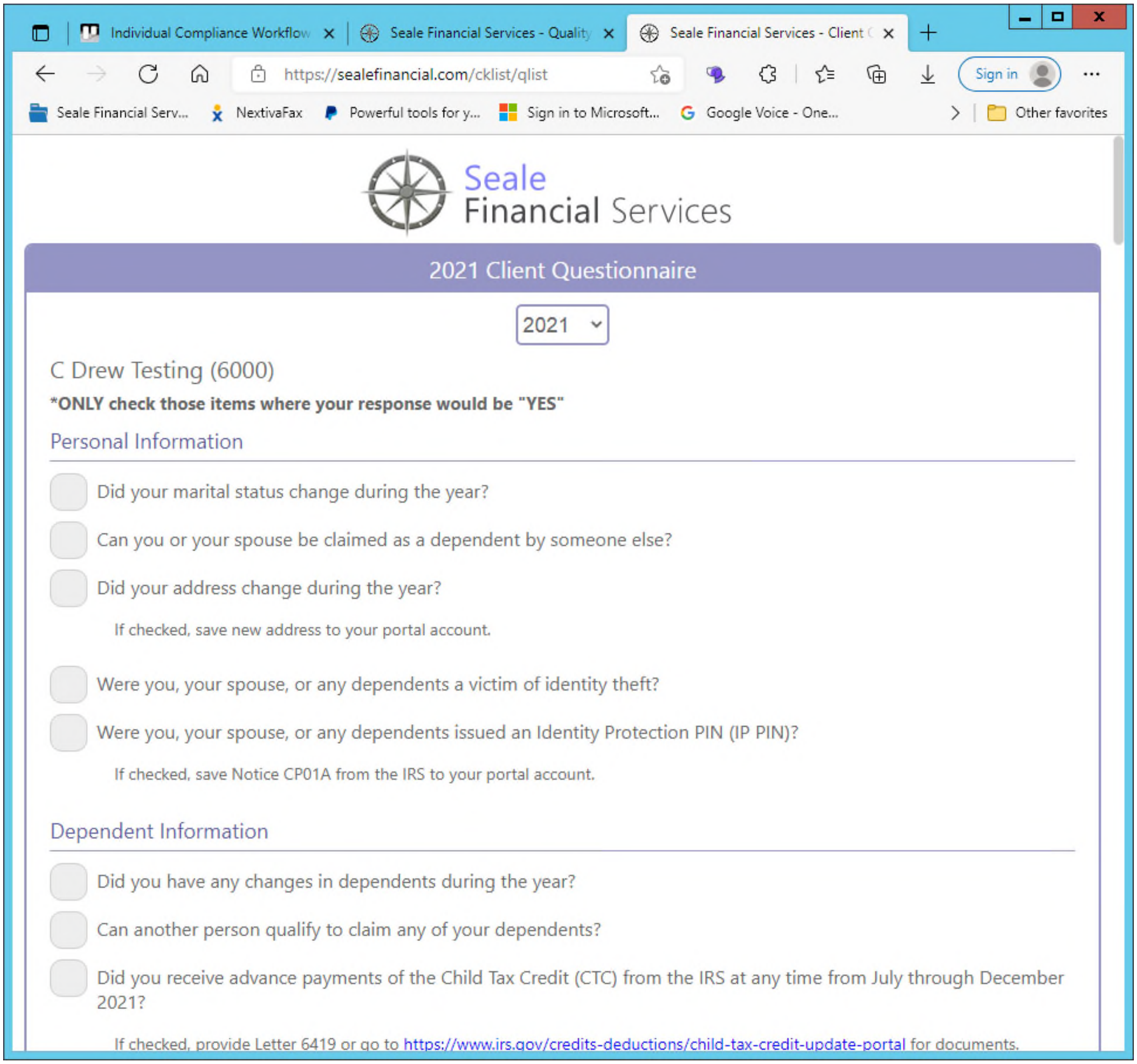




Step 5 – update your contact information if necessary.



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



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https://sealefinancial.com/cklist/qlist

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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.

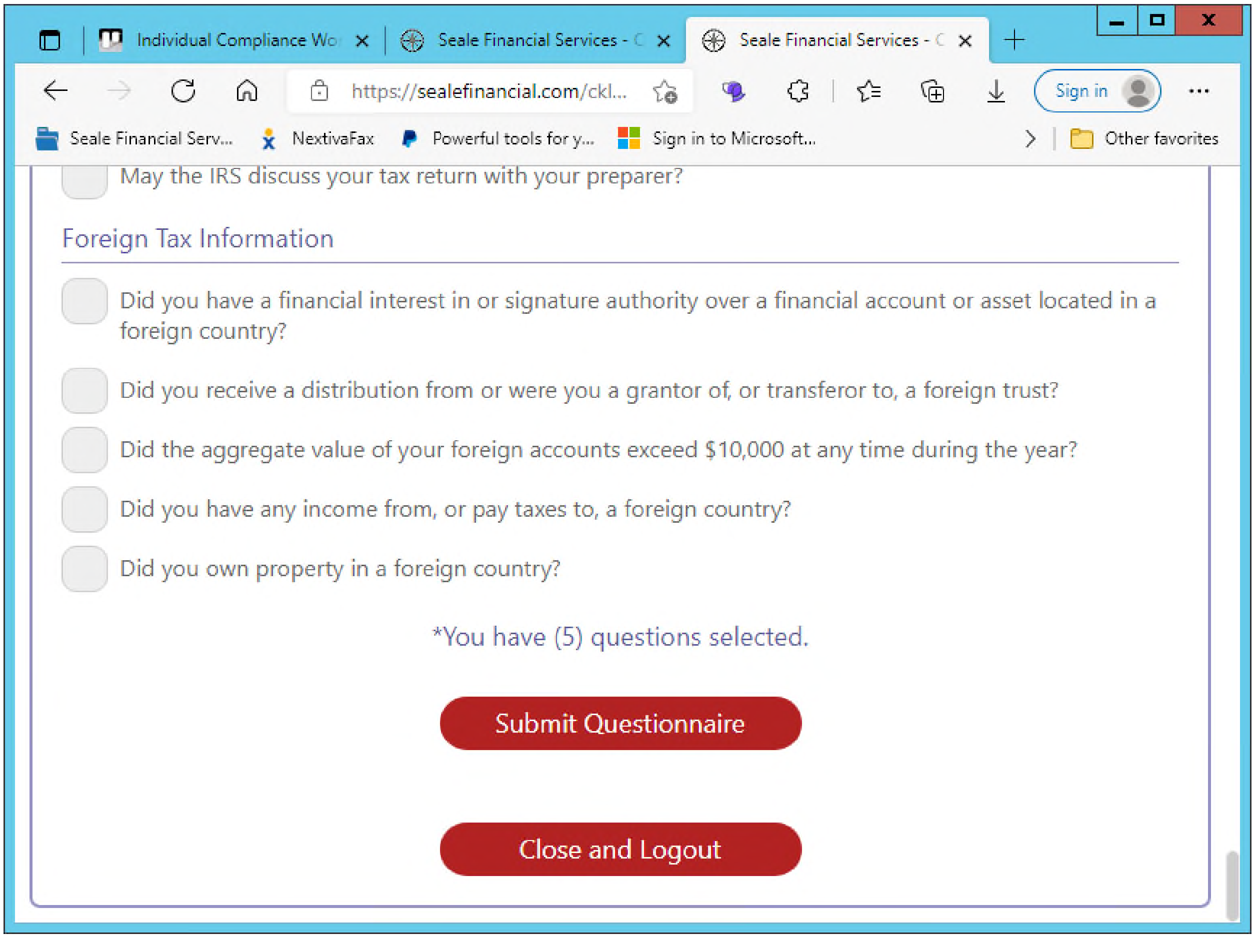
- [ ] Were you, your spouse, or any dependents a victim of identity theft?
- [ ] Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?

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

Dependent Information

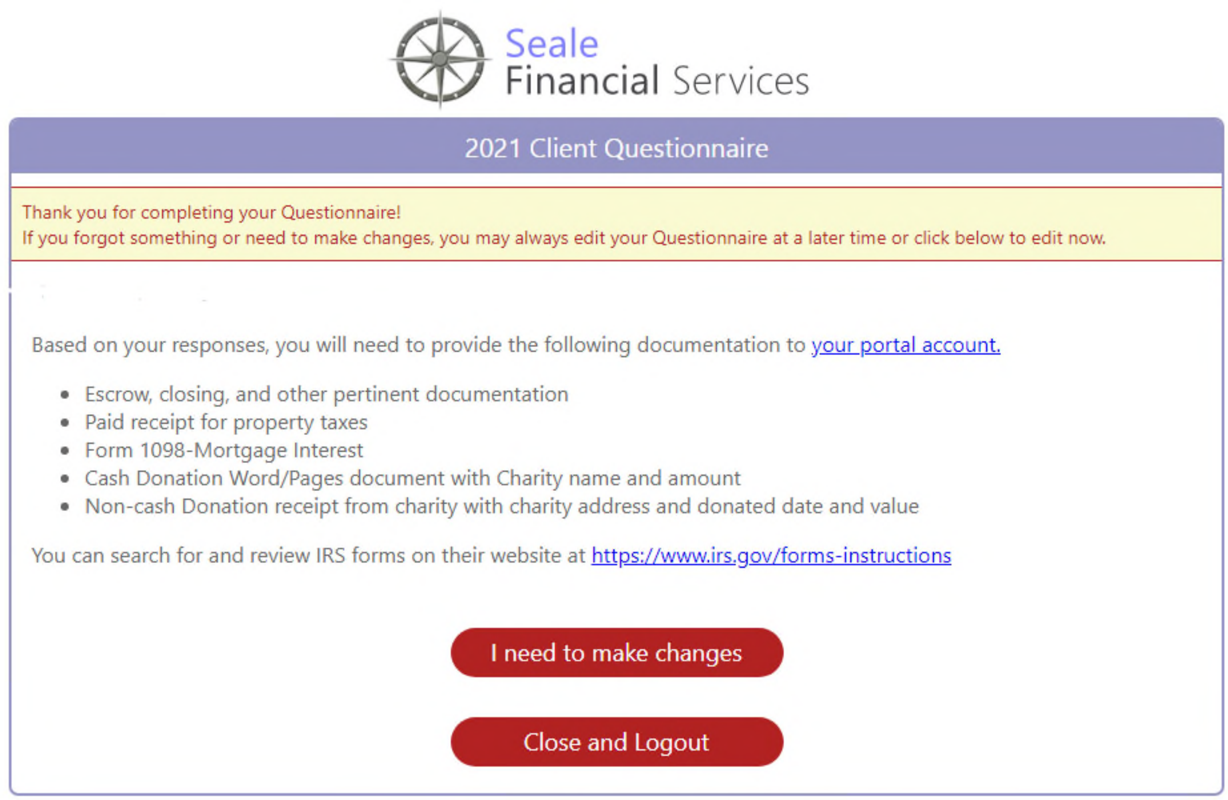
- [ ] Did you have any changes in dependents during the year?
- [ ] Can another person qualify to claim any of your dependents?
- [ ] Did you receive advance payments of the Child Tax Credit (CTC) from the IRS at any time from July through December 2021?

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



click on submit questionnaire

Step 7 gather additional documents.



Seale Financial Services

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.