

2023 Questionnaire

Please check the appropriate box and include all necessary details and documentation.

**** If you do NOT want to extend your return, please provide ALL information by March 1st****

Yes No

Personal Information

- Did your marital status change during the year? **If yes, explain:** _____
- Did your address change from last year? _____
- Can you be claimed as a dependent by another taxpayer?
- Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that we used for your 2022 return? **If so, please provide a copy of a check.**
- Did you or any dependent receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? **If so, attach the IRS letter.**

Dependent Information

- Were there any changes in dependents from the prior year? **If yes, explain:** _____
- Do you have any children under age 19 or a full-time student under age 24 with total investment income in excess of \$2,500? **If so, provide income information.**
- Do you have dependents who must file a tax return? **If so, please provide a copy of their filed return.**
- Did you provide over half the support for any other person(s) other than your dependent children during the year? **If so, please provide details.**
- Did you pay for child care while you worked, looked for work, or while a full-time student? **If so, include provider details and expenses paid.**
- Did you pay any expenses related to the adoption of a child during the year? **If so, please provide a list of expenses.**

Business Information

- Did you start a new business or farm, or purchase rental or royalty property this year?
- Did you acquire a new or additional interest in a partnership or S corporation?
- Did you sell an existing business, rental or other property this year? **If yes, please provide documents.**
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any personal assets to business use?
- Did you pay health insurance premiums for your employees this year?
- Did you use your car for business (other than to and from work)? **If yes, complete and sign the auto vehicle information sheet.**
- Was your home rented out or used for business? **If so, please provide details.**

Yes No

- Are you an owner or do you control 25% of a company's ownership interest for a company registered with a secretary of state or similar office before January 1, 2024?
- Do you plan to become an owner or control at least 25% of a company's ownership interests for a company registered with a secretary of state or similar office for the first time after January 1, 2024?
- Did you make any payments in 2023 in the course of a trade or business which would require you to file Form(s) 1099?
- If you checked **yes** above, did you or will you file ALL required Form(s) 1099?

Investment Information

- Did you buy or sell any stocks, bonds or other investment property in 2023?
- Did you exercise any stock options or sell any related stock?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? **If so, please provide settlement statements.**
- Did you have any debts cancelled or forgiven this year, such as a home mortgage or student loan(s)? **If so, provide Form 1099-C.**
- Did you purchase a new or previously owned Clean vehicle this year that is eligible for the new clean vehicle credit? **If so, please provide receipts and vehicle statement.**
- Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal, or fuel cell property or improvements? **If so, please provide receipts and certificate.**

Income Information

- Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?
- Did you receive any unemployment benefits during the year? **If so, provide Form 1099-G.**
- Did you receive any other miscellaneous income, such as tips, commissions, jury duty, social security benefits, disability income, prizes, hobby income or gambling winnings? **If so, please provide documentation including gambling deficits.**
- Did you receive any income considered to be nonemployee compensation?
- Did you receive a Form 1099-K, 1099-MISC, 1099-NEC, or other income statement for work done in what is commonly referred to as the "gig" economy?
- Do you expect a large fluctuation in income, deductions, or withholding next year? **If so, please explain.**
- Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork), or used digital assets to pay for goods or services?

Retirement Information

- Did you make any withdrawals/receive a distribution from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

Yes No

- Did you make any Qualified Charitable Distributions (QCDs) from your IRAs?
- If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2023?
- Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan *outside* of your employer employment plan?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?
- Did you transfer or rollover any amount from one retirement plan to another?
- Do you wish to make a contribution to an IRA or retirement plan if eligible?

Education Information

- Did you, your spouse, or dependent incur any educational expenses during the year that are required to attend a college, university or vocational school? **If so, include all Form(s) 1098-T and receipts/lists for qualified tuition and related expenses.**
- Did you make any withdrawals from an education savings or 529 Plan account? **If so, include all Form 1099-Q(s).**
- Did you pay any student loan interest this year? **If so, provide Form 1098-E.**

Health Care Information

- Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? **If yes, attach any Form(s) 1095-A you received.**
- Did you make any contributions to or receive any distributions from a Health savings account (HSA) or Archer MSA? **If yes, include Form 1099-SA.**
- If yes, were all distributions for qualified medical expenses?
- Did you pay long-term care premiums for yourself or your family?
- Did you make any contributions to or receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? **If yes, provide Form 1099-QA.**

Itemized Deduction Information

- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Did you pay real estate taxes for your primary home and/or second home?
- Did you pay sales tax on motor vehicle, aircraft, boat or home remodel during the year? **If so, please attach receipts showing sales tax paid.**
- Did you pay any mortgage interest on an existing home loan? **If so, attach any Form(s) 1098 you received.**
- Did you incur interest expenses associated with any investment accounts you held?
- Did you incur a casualty or theft loss or any condemnation awards during the year?
- Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? **If so, please provide details and receipts from the charity to substantiate all contributions made.**

Yes No

Were all non-cash charitable contributions in good condition or better?

Did you donate a vehicle or boat during the year? **If so, attach Form 1098-C or other written acknowledgment from the donee organization.**

Miscellaneous Information

Did you incur any expenses working as a teacher, counselor, or principal for classes kindergarten through grade 12? **If so, how much (up to \$300)?**

Did you or your spouse make gifts of more than \$17,000 to any individual?

Did you engage in any bartering transactions?

Did you retire or change jobs this year?

Did you pay any individual as a household employee during the year?

Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?

Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?

Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?

Did you receive correspondence from the State or the IRS? **If yes, explain:** _____

Did you make any estimated tax payments for 2023? **If yes, please provide dates and amounts of estimated tax payments.**

If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead of being refunded)?

If you have a refund due, do you want it directly deposited into your bank account?

If you owe with your return, would you like it automatically drafted from your bank account?

Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.

Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

May the IRS discuss your tax return with your preparer?

Would you prefer to receive your 2024 organizer through your secure portal instead of by mail?

Would you like to receive a paper copy of your tax return in addition to the electronic copy?

Do you want your original documents and/or paper copy of your tax return mailed to you? If you select no, please pick them up at the office.

If you marked "yes" on any of the questions, please provide requested documentation.

Please sign here: _____ Date: _____

Print Name _____

Preferred email: _____

Preferred phone: _____ home/cell/work (circle one)

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Please list any items not addressed above which may be important to your tax return, as well as any matters you would like to discuss.