



2023 Tax Questionnaire

Please complete and return this questionnaire with your tax data

Name(s) _____

Address _____ City _____ State _____ ZIP _____

Cell Phone () _____ Name or Initials for phone _____ Email _____

Cell Phone () _____ Name or Initials for phone _____ Email _____

Home Phone () _____

Yes No

☐ ☐ Are you a new client?

Yes No PERSONAL INFORMATION

☐ ☐ Did your marital status change during the year? If so, please explain: _____

☐ ☐ If yes, did you change your name with the Social Security Administration?

☐ ☐ Did your address change from last year? If so, please fill out the address section above.

☐ ☐ Were there any changes in dependents from the prior year? If so, please explain: _____

☐ ☐ Do you have dependents who must file a tax return?

☐ ☐ Did you provide over half the support for any other person(s) other than your dependent children during the year?

☐ ☐ If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?

Yes No MISCELLANEOUS INFORMATION

☐ ☐ Do you have any foreign bank accounts, or interest in foreign businesses or assets?

☐ ☐ Did you sell any cryptocurrency in 2023? If so, please provide details of the sale and original purchase of the currency.

☐ ☐ Did you receive IRS correspondence during the year? If so, please provide us with a copy.

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

☐ ☐ Did you engage in any bartering transactions?

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

Yes No REFUND & PAYMENT OPTIONS (check all that apply)

☐ ☐ Direct deposited your refund last year? If so, would you like to again?

☐ Same bank account?

☐ Different Account? Please provide a voided check

☐ ☐ Did not direct deposit last year but would like to this year? Please provide a voided check

☐ ☐ If you owe tax for 2023, do you want the payment withdrawn from your account on the due date? (April 15, 2024)

INCOME

☐ Workin' for a livin'? If so, we need all your **W-2s**.

☐ Found yourself or your spouse unemployed? We'd like your **1099Gs**.

☐ Making some interest on your money? It's your **1099-INT** we need.

☐ Invested in the market? We'll need your **1099-DIVs and 1099Bs**.

☐ Enjoying social security benefits? Congrats, we need your form(s) **SSA-1099**.

☐ Receiving retirement income? It'll be **1099-R** forms that we will want to see.

☐ Are you a partner in a partnership or a shareholder in an S-Corporation? We are going to need your **K-1 form(s)**.

☐ And the same if you are receiving any income from a trust or estate.

Income continued on back...



2023 Tax Questionnaire

Please complete and return this questionnaire with your tax data

- ☐ Got lucky at the casino or other gambling? If so, we could use your form **W-2G(s)** and your **expenses/losses**.
- ☐ If you received a state or local tax refund in 2023, please also bring in forms **1099-G** that you receive.
- ☐ Rent your property in 2023? Here's what we would like:
 - ☐ Your **income, including 1099-MISC**.
 - ☐ Your **expenses, including mileage**. (By property)
- ☐ Self-employed? Good for you! Please bring in all your **records of income, expenses, assets, and liabilities**.
- ☐ Farming? That's great! We'd like the **same records as for self-employed**.
- ☐ Sell your home? Please bring in form **1099-S, closing statement, and your cost of the home you sold**.
- ☐ Sell any other real estate in 2023? Please provide the **closing statement, original cost, improvements and date of purchase of the property**.
- ☐ Any other income? Please bring in **1099-MISC form and records of any related expenses**.

EXPENSES

- ☐ Contribute to an **IRA, SEP, SIMPLE, or plan to do so by 4/15/24**? We will want **amounts contributed for you and/or spouse**.
- ☐ How about an **HSA, or plan to do so by 4/15/24**? We will need the **same information as above and form 1099-SA**.
- ☐ Are you an educator? We will want your **unreimbursed expenses up to \$300 per educator**.
- ☐ In the reserves? We salute you and request your **expenses**.
- ☐ Move while on active duty? We'd like to know **distance and your direct costs**.
- ☐ Paying on student loans? **1098-Es** we could use.
- ☐ Speaking of education ... If you or your child is attending college, we will need your form **1098-T, as well as the cost of items like books, supplies, and equipment**.
- ☐ Paying/receiving alimony for a divorce that was finalized by 12/31/18? Please provide amount paid/received in 2023.
- ☐ Itemize your deductions? If so, here's what we need:
 - ☐ **List of your medical deductions**.
 - ☐ **Property, sales tax, and license tab fees**.
 - ☐ **Mortgage / home-equity loan interest paid to buy, build or improve your home**.
 - ☐ **List of charitable contributions**. (Note: you need a written receipt for any donation of over \$250 given to an organization in one day).
 - ☐ **Gambling losses incurred with gambling winnings**.
- ☐ Paying for childcare while working? We'll want **name, ID number, address, and amount paid to the provider**.
- ☐ Make energy-efficient home improvements or purchase an electric vehicle in 2023? Please provide **details and costs**.
- ☐ Receive an ACA/Marketplace premium tax credit? We are going to need your **1095-A form(s)**.
- ☐ Did you make any out-of-state purchases for which the seller did not collect state sales or use tax? If so, we'll need the amount of purchases.
- ☐ Were you a victim of identity theft within the last year? We will need a **copy of your drivers license**. If you have received a **letter from the IRS with an assigned IP PIN number** for the 2023 tax year, please provide that, as well.

We tried to cover every situation, but please provide any other information you think we may need!

Your Signature _____ Date _____