

# Questionnaire

## 2023 Taxes

Please circle the appropriate answer and include all necessary details and documentation.

### Personal Information

- Yes No Did your marital status change during the year? If yes, explain: \_\_\_\_\_
- Yes No Did your address change from last year? New Address \_\_\_\_\_
- Yes No Can you be claimed as a dependent by another taxpayer?
- Yes No Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account numbers change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?
- Yes No Did you or your spouse (if applicable) receive an Identity Protection PIN (IP PIN) from the IRS? If yes, attach the IRS letter for filing returns in 2023.
- Yes No Did you reside in or operate a business in a Federally declared disaster area?

### COVID-19 Information

- Yes No Did you receive State and Local Fiscal Recovery Funds (SLFR) under a program to support those negatively impacted by the COVID-19 pandemic for helping you with your mortgage insurance and/or home purchases, such as funds to pay some or all of the down payment and closing costs associated with your purchase of a home?
- Yes No Are you a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state?

### Dependent Information

- Yes No Were there any changes in dependents from the prior year?  
If yes, explain: \_\_\_\_\_
- Yes No Do you have any children with ***UNEARNED income (stock sales, interest, etc.)*** in excess of \$2,500 **AND** under age 19 or a full-time student under age 24?
- Yes No Do you have dependents who must file a tax return?
- Yes No Did you provide over half the support for any other person(s) other than your dependent children during the year?
- Yes No Is there any other person(s) who lived with you more than half the year **BUT** not claimed by you last year?
- Yes No Did you pay for child care while you worked, looked for work, or while a full-time student?
- Yes No Did you (or your spouse) allocate a portion of your pay to a Dependent Care FSA?
- Yes No Did you pay any expenses related to the adoption of a child during the year?
- Yes No 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 Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS? If yes, attach the IRS letter with the IP PIN for filing returns in 2023.

### Purchases, Sales and Debt Information

- Yes No Did you start a new business or purchase rental property during the year?
- Yes No Did you sell, exchange, or purchase any assets used in your trade or business?
- Yes No Did you acquire a new or additional interest in a partnership or S corporation?
- Yes No Did you sell, exchange, or purchase any real estate during the year?

- Yes No Did you purchase or sell a principal residence during the year?
- Yes No Did you foreclose or abandon a principal residence or real property during the year?
- Yes No Did you acquire or dispose of any stock during the year?
- Yes No Did you take out a home equity loan this year?
- Yes No Did you refinance a principal residence or second home this year?
- Yes No Did you sell an existing business, rental, or other property this year?
- Yes No Did you lend money with the understanding of repayment and this year it became totally uncollectible? If yes attach explanation of efforts to collect the debt.
- Yes No Did you have any debts cancelled or forgiven this year, such as a home mortgage or student loan(s)?
- Yes No Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle? If yes, attach the vehicle statement from the dealer including VIN.

### **Income Information**

- Yes No 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?
- Yes No Did you receive any income from property sold prior to this year?
- Yes No Did you receive any unemployment benefits during the year?
- Yes No Did you receive any disability income during the year?
- Yes No Did you receive tip income not reported to your employer this year?
- Yes No Did you receive any Medicaid waiver payments as difficulty of care this year?
- Yes No Did any of your life insurance policies mature, or did you surrender any policies?
- Yes No Did you receive any awards, prizes, hobby income, gambling or lottery winnings?
- Yes No Did you receive any income considered to be non-employee compensation?
- Yes No 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?
- Yes No Do you expect a large fluctuation in income, deductions, or withholding next year?
- Yes No Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork, or use digital assets to pay for goods or services)?

### **Retirement Information**

- Yes No Are you an active participant (contributing or able to) in a pension or retirement plan?
- Yes No Did you receive any Social Security benefits during the year?
- Yes No Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
- Yes No If yes, were any withdrawals due to a Federally declared disaster?
- Yes No If you received any qualified disaster retirement plan distributions, did you repay any in 2023?
- Yes No Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?
- Yes No Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan other than through your employer?
- Yes No Did you make any qualified charitable distributions (QCD) during the year?
- Yes No Do you want to designate someone we can contact in case of your death or incapacitation during the preparation of your tax return? (This does not constitute a power of attorney.) If so, please print name, contact information and relationship. \_\_\_\_\_

### **Education Information**

- Yes No Did you, your spouse, or your dependents attend a post-secondary school during the year?

- Yes No Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, attach any Form(s) 1098-T and receipts for qualified tuition and expenses.
- Yes No Did anyone in your family receive a scholarship of any kind during the year?
- Yes No If yes, were any of those scholarship funds used for expenses other than tuition?
- Yes No Did you make any withdrawals from an education savings or 529 Plan account?
- Yes No If yes, were any of these withdrawals rolled over into a ABLE account?
- Yes No Did you make any contributions to an education savings or 529 Plan account?
- Yes No Did you pay any student loan interest this year?
- Yes No Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

### **Health Care Information**

- Yes No Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? "Your Family" for health care coverage refers to you, your spouse if filing jointly, and dependent claimed.
- Yes No Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, attach any Form(s) 1095-A.
- Yes No Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family?
- Yes No Did you make any contributions to a Health savings account (HSA) or Archer MSA?
- Yes No Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year? (Did you use the debit card?)
- Yes No Did you pay long-term care premiums (Nursing Home Insurance) for yourself or your family?
- Yes No Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? If yes, attach Form(s) 5498-QA you received.
- Yes No Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 1099-QA you received.
- Yes No If you are a business owner, did you pay health insurance premiums for your employees?

### **Itemized Deduction Information**

- Yes No Did you incur a casualty or theft loss or any condemnation awards during the year?
- Yes No If yes, did the loss occur in a Federally declared disaster area?
- Yes No Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Yes No Did you make any cash or non-cash charitable contributions (clothes, furniture, etc.)? If yes, please provide evidence such as a receipt from the donee organization, a cancelled check, or record of payment, to substantiate all contributions made.
- Yes No Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgment from the donee organization.
- Yes No Did you pay real estate taxes for your primary home and/or second home?
- Yes No Did you pay any mortgage interest on an existing home loan? If yes, attach any Form(s) 1098
- Yes No Did you make any major purchases during the year (cars, boats, etc.)?
- Yes No Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax? If yes, you may need to pay consumer use tax.
- Yes No Did you **PAY** interest expenses associated with any investment accounts you held?

### **Miscellaneous Information**

- Yes No Did you make gifts of more than \$17,000 to any individual?
- Yes No Did you utilize an area of your home for business purposes? Non-employees only.

- Yes No Did you engage in any bartering transactions?
- Yes No Did you retire or change jobs this year?
- Yes No Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?
- Yes No Did you pay any individual as a household employee during the year?
- Yes No Did you make energy efficient improvements to your main home this year?  
Please list \_\_\_\_\_
- Yes No Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
- Yes No 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**?
- Yes No Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?
- Yes No Did you receive correspondence from the State or the IRS?  
If yes, explain: \_\_\_\_\_
- 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?
- Yes No 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?
- Yes No Do you have previous years of tax returns that are either unfiled or filed with unpaid balance?
- Yes No Do you want to designate \$3 to the Presidential Election Campaign Fund?
- Yes No Have you read our privacy policy shown at the bottom of this document?
- Yes No Will you allow us to send you a text regarding your taxes such as questions we may have while preparing your taxes or an alert when they are ready for pickup? If yes, please indicate what number(s) to use. \_\_\_\_\_ We will not share this number.

X \_\_\_\_\_ (Client Signature) \_\_\_\_\_ (Date)

\_\_\_\_\_ (Printed Name)

X \_\_\_\_\_ (Client Signature) \_\_\_\_\_ (Date)

\_\_\_\_\_ (Printed Name)

By signing this document, the signer(s) agrees that all questions are answered truthfully.

### Our Privacy Policy

The personal, non-public information we collect about you has been derived from the following sources:

- Tax organizers, worksheets, questionnaires, and any documents that you provide for use in preparing your tax return.
- Bank statements, check registers, worksheets, ledgers, computer files and other documents that you provide for use in preparing your Financial Statements, Payroll Reports, or other reports.
- Information received about you from a consumer reporting agency or other company.
- Information you provide during personal interviews, telephone conversations, or texts.
- Transactions with our firm or with others.

We restrict access to non-public personal information about you to members of our firm who need to know this information in order to complete the work you have hired our firm to do. Procedural, physical, and electronic safeguards are maintained in compliance with Federal standards regarding non-public personal information. We will not disclose your personal and confidential information with anyone outside of our firm without your express written permission to do so.

Your privacy is important and we want to assure you that any information you give us remains safe and confidential. Please feel free to contact us if you have any questions concerning this policy.