

## 2023 Tax Questionnaire for \_\_\_\_\_

Client Name

Contact Information

To ensure we have the most up-to-date information, please fill in your information below.

Phone: \_\_\_\_\_

Spouse's Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Spouse's Email: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

General

If you receive a refund, would you like direct deposit? If yes, please provide us with a voided check.

Yes

No

Do you expect your 2024 taxable income and withholdings to be significantly different from 2023?

Yes

No

Estimated Taxes

Did you make any estimated tax payments for 2023? If yes, enter your payments below (include date, amount, and whether it was federal, state, or local).

Yes

No

**Federal****State****Local**

Date

Amount

Date

Amount

Date

Amount

_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

### Personal and Dependent Information

Did your marital status change in 2023? If yes, please explain: _____	Yes	No
Did you have a baby or a new dependent in 2023? If yes, please enter their name, Social Security number, and date of birth: _____	Yes	No
In 2023, did you have a child over 18 that was no longer a full-time student? If yes, please enter their name: _____	Yes	No
Did you have any dependents with unearned income (such as interest, dividends, or capital gains) in excess of \$1,250 or total investment income in excess of \$2,200?	Yes	No
Did you pay any child care expenses during 2023? If yes, please provide the amount paid along with their name, address and Taxpayer Identification Number.	Yes	No

### Purchases, Sales and Debt

Did you buy or sell any stocks, bonds, or other investment property in 2023?	Yes	No
Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?	Yes	No
Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?	Yes	No
Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?	Yes	No
Did you have any debts cancelled or forgiven?	Yes	No
Does anyone owe you money which has become uncollectible?	Yes	No

### Health Insurance

Did you receive IRS Form 1095-A (Health Insurance Marketplace Statement)? If yes, provide Form 1095-A.	Yes	No
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### Retirement and Health Savings Account Plans

Did you transfer or roll over any amount from one retirement plan to another?	Yes	No
Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc)?	Yes	No
Did you receive a distribution from a health savings account (HSA)?	Yes	No
Did you make a contribution to a retirement plan?	Yes	No
Did you make a contribution to an HSA?	Yes	No

### Education

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?	Yes	No
Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?	Yes	No

### Income

Did you receive unreported tip income of \$20 or more in any month?	Yes	No
Did you have any foreign income or pay any foreign taxes?	Yes	No
Did you receive any income that you did not receive a tax form for?	Yes	No

### Itemized Deductions

Did you work out of town for part of the year?	Yes	No
Did you have any volunteer miles or make any non-cash charitable contributions?	Yes	No
Did you pay any real estate taxes in 2023?	Yes	No

### Miscellaneous

Was your home rented out or used for business?	Yes	No
Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?	Yes	No
At any time during 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	Yes	No
Did you make any energy-efficient improvements to your home in 2023, such as insulation, windows, doors, heat pumps, or water heaters?	Yes	No
Did you engage the services of any household employees?	Yes	No
Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?	Yes	No
Did you receive any money or other benefits due to the death of a loved one?	Yes	No

### \*New Clients Only\*

In the space below, enter the names, dates of birth, and social security numbers for yourself and all other members that will be included on your tax return (spouse, dependents, etc).

Name	Date of Birth	Social Security Number
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____