

2022 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

Would you prefer a PDF copy of your tax return available on your client portal or would you prefer a paper copy? PDF Paper Both

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 2023 taxable income and withholdings to be significantly different from 2022? Yes No

Estimated Taxes

Did you make any estimated tax payments for 2022? 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 2022?

Yes No

If yes, please explain: _____

Did you have a baby or a new dependent in 2022?

Yes No

If yes, please enter their name, Social Security number, and date of birth:

In 2022, did you have a child over 18 that was no longer a full-time student?

Yes No

If yes, please enter their name:

Did you have any dependents with interest, dividend, or capital gains income in excess of \$1,150 or total investment income in excess of \$2,200?

Yes No

Did you pay any child care expenses during 2022? 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 2022?

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)?

Yes No

If yes, provide Form 1095-A.

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 2022? 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 2022, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No

Did you or your spouse make any gifts to an individual that total more than \$16,000 or any gifts to a trust? 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
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____