

2023 INDIVIDUAL TAX QUESTIONNAIRE (FORM 1040)

Please check the appropriate box and include an explanation if applicable. Details and documentation must be provided with your tax return information at the beginning of the year, or with this questionnaire.

Taxpayer Name: _____

Spouse Name: _____

Taxpayer Email: _____

Spouse Email: _____

Taxpayer SIN: _____

Spouse SIN: _____

Taxpayer Birthday: _____

Spouse Birthday: _____

Personal Information

Yes	No	Explanation
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- Did your marital status change during the year? If yes, please explain.
- Did your address change from last year?
- Were you a resident of, or did you have income from, more than one state during the year? If yes, please explain.
- Is all beneficiary information up-to-date for any wills, trusts, retirement plans and investment accounts?

Dependent Information

- Were there any changes in dependents from the prior year?
- Do you have any children that are under age 19 or full-time students under age 24 with unearned income in excess of \$2,200?
- Did you provide over half the support for any other person(s) during the year?
- Did you pay for child care while you worked or looked for work?

Purchases, Sales and Debt Information

- Did you start a new business or farm or purchase rental or royalty property during the year?
- Did you acquire a new or additional interest in a partnership, LLC or S corporation?
- Did you sell, exchange, or purchase any real estate during the year?
- Did you sell an existing business, rental, or other property this year?
- Did you purchase or sell a principal residence during the year?
- Did you foreclose or abandon a principal residence or real property during the year?
- Did you dispose of any stock during the year?
- Did you take out a home equity loan or refinance a principal/second residence this year?
- Did you incur any bad debts or have any debts canceled/forgiven this year?
- NOTE** - provide closing statements, as necessary, for any purchases or sales of property.

Income Information

- Did you receive any income from property sold prior to this year?
- Did you receive any payments from a pension, profit sharing or 401(k) plan?
- Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401k, or other qualified retirement plan?
- If you or your spouse have self-employment income, do you want to make a retirement plan contribution?
- Did you make any withdrawals from an education savings or 529 Plan account?
- Did you make any withdrawals from or contributions to Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA this year?
- Did you receive any Social Security benefits during the year?
- Did you receive any benefits this year (unemployment, disability benefits, etc.)?
- Did you have any income from side businesses or other income-producing activities (Uber, internet sales, etc.)?
- Did you receive sell, send, exchange or otherwise acquire any financial interest in any virtual currency?

Health Care Information

Yes No Explanation

- Did your family have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for every month of 2023?
- Did anyone in your family qualify for an exemption from the health care coverage mandate?
- Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, please provide any Form(s) 1095-A you received.
- Did you pay long-term care premiums for yourself or your family?
- If you are a business owner, did you pay health insurance premiums for your employees this year?

Itemized Deduction Information

- Did you incur a casualty loss in a Federally declared disaster area during the year?
- Do you have evidence to substantiate charitable contributions?
- Did you make any noncash charitable contributions (clothes, furniture, boat, vehicles, etc.)? Please remember to provide documentation for donations over \$500.
- Did you use a car for business, charity, or medical care? Circle which one(s).
- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Did you make any student loan interest payments during the year?

Miscellaneous Information

- Did you make gifts of more than \$15,000 to any individual?
- Did you make any contributions to an education savings or 529 Plan account?
- Did you exclusively utilize an area of your home for business purposes?
- If you have a Schedule C, E or F, do you have a 1099 filing requirement (paid \$600 or more to any one vendor that is NOT incorporated OR for legal services)?
- Are you covered by a pension or retirement plan?
- Did you retire or change jobs this year?
- Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?
- Did you pay any individual as a household employee during the year?
- Were you a grantor or transferor for a foreign trust, did you have an interest in or a signature or other authority over a bank account, have foreign stocks or securities issued by someone other than a US person, have an interest in a foreign entity, receive foreign income, or pay any foreign taxes during the year?
- Do you have a power of attorney or signature authority for a person who has interest in a foreign financial account?
- Did you receive correspondence from the State or the Internal Revenue Service?
- If yes, please provide copies.
- Did you make estimated tax payments in 2023, and will you make one on 1/15/24?
- Please provide the dates and estimated payments made:

Federal Estimates:

Date Paid	Amount

State Estimates:

Date Paid	Amount

- Do you want to designate \$3 to the Presidential Election Campaign Fund?
- May the IRS discuss this return with the preparer?
- Would you like direct deposit if entitled to a refund?
- Would you like direct withdrawal if you owe taxes?
- Do you expect your 2023 income and expenses to be similar to 2022?
- Are there any tax, personal financial or tax planning issues (i.e. retirement or college education) on which you would like us to focus? If yes, please explain or contact us.