

2023 Tax Questionnaire

Section	Question	Answer (Y/N is fine for most questions)
Client Information	Is this for a joint return?	
	What year is this for?	
	Your Name	
	Your Spouse's Name	
	Your email address and telephone number	
	Your spouse's email address and telephone number	
	Did you get married, separated, or divorced in 2023?	
	Your occupation	
	Your spouse's occupation	
	Was there a change in the number of your dependents in 2023?	
	Did your address change in the past year?	
	Foreign Address	
	Can you be claimed as a dependent by another taxpayer?	
	Do you have any children under age 19 or college students under 24 with unearned income in excess of \$2,500?	
	Did you pay any student loan interest in 2023?	
Did you maintain a home for someone not claimed as a dependent?		
Did you have child care expenses in 2023?		
Are you in the military?		
Bank and Financial Information	If your return shows a refund you would like it:	
	Did you own any type of cryptocurrency during the past calendar year, even if you did not buy, sell, or exchange it?	
	Did you have any non-US based bank or investment accounts during the last calendar year? Please note that answering "yes" does not necessarily mean that any additional tax will be owed.	

Health Insurance	Did all members of your household have healthcare coverage last year?	
	Did you purchase health insurance through a government marketplace?	
	If you worked for yourself did you pay health insurance premiums for yourself and your family?	
	Did you receive any disability income last year?	
Purchase, Sales and Debt	Did you sell, exchange, or purchase any real estate during the year?	
	Closing Statement Attached	
	Did you dispose of any stock during the year?	
	Did you participate in inputs or stock transactions?	
	Did you take out a home equity loan, line of credit, or refinance any property?	
	Closing statement attached below	
	Did you purchase any hybrid (gas/electric) auto? If no leave blank, if yes include make/model and year below	
Income	Did you have self employment income in 2023?	
	Did you receive income from property sold prior to this year?	
	Did you receive executor or jury duty fees?	
	Did you receive employer - provided education assistance?	
	Did you or your spouse receive Social Security payments in 2023?	
	Did you or your spouse receive unemployment and/or paid family leave payments in 2023?	
	Did you earn any income in a foreign country last year, or pay foreign taxes?	
	Did you receive damage award for personal injury, sickness or discrimination?	
	Did you receive alimony? (NOT child support)	
	Did you cash in any US savings bonds?	
	Did you donate to any charities by cash/check/credit card in 2023?	
	Did you start a business, purchase rental property, or invest a significant amount into a partnership, LLC, or S-corporation?	
	Did you dispose of a business in 2023?	

	Did you purchase, sell, or refinance your principal or second home in 2023?	
	Did you make any solar, wind, geothermal, or fuel cell improvements to your home?	
	Did you receive any lump-sum payment from a pension or profit sharing plan?	
	Did you make any retirement contributions for last year?	
	Did you make any rollovers or withdrawals from any retirement accounts?	
	Did you contribute to an HSA account last year?	
	Did you take money out of an HSA in 2023?	
	Did you have any debts cancelled or forgiven last year?	
	Did you or any of your dependents receive a distribution from an Education Savings Account or 529 plan?	
	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school last year?	
	Did you contribute to a 529 plan?	
Deductions, Credits	Did you incur an unreimbursed casualty or theft loss greater than 10% of your income?	
	Did you work out of town during the year?	
	Did you pay alimony or child support?	
	Did medical expenses exceed 7.5% of your income?	
	Did you have moving or job seeking expenses?	
	Are you a teacher or school administrator who provided school supplies for your job?	
	Do you own or invest in a business that is considered manufacturing?	
	Did you pay sales tax on a car, boat, motorhome, manufactured home, truck, motorcycle, or plane purchased for personal use?	
	Have you started the adoption process?	
	Did you start a new pension plan?	
	Did you make energy efficient improvements to your home in 2023?	
Miscellaneous	Did anyone in your household receive a distribution from or was the grantor of a foreign trust or estate?	

	Did you make or receive any gifts of more than \$17,000 to any individual last year? A gift is generally not taxable to the recipient.	
	Did you engage in any bartering transaction?	
	Are you covered by a pension plan?	
	Do you have stock options?	
	Did you engage the services of any full time household employees? This is usually a full time groundskeeper, nanny, housekeeper, etc and does not refer to helpers or businesses which come for a few hours per week or less.	
	Did you receive correspondence from federal, state tax authorities in 2023?	
	Do you have a current will for financial and health care decisions?	
	Is there anything else about your income or deductions in 2023 that you think we should know about?	