

PERSONAL TAX QUESTIONNAIRE

Name: _____ Tax Year _____

Please answer the following questions to determine maximum deductions:		YES	NO
Would you like to receive text message regarding your account (return status, appointments, etc.)			
If yes, what number would you like us to use for texts	Contact Name		
Did your marital status change during the year?			
Did your address change during the year?			
Were there any changes in dependents? (For any new dependent, provide copy of social security card)			
Did you incur any expenses in connection to an adoption of a child?			
Did any of the dependents you are claiming file their own tax return? If yes, please send copy of their tax return			
Did you change jobs during the year?			
Did you receive unreported tip income?			
Did you receive any unemployment or disability income?			
Did you pay or receive preexisting ¹ alimony? Paid \$ _____ Received \$ _____ Date of Original Divorce or Separation agreement _____			
Did you or your spouse qualify for Social Security Benefits?			
Did you pay any student loan interest?			
Did you buy or sell any stocks, bonds or other investment property?			
Did you purchase, sell, refinance your principal home or second home, or take out a home equity loan?			
Did you convert part or all of your traditional/SEP/SIMPLE IRA to a ROTH IRA?			
Could you be claimed as a dependent on another person's tax return?			
Did you pay anyone for domestic/household services at your personal residence(s)?			
Did you pay anyone for childcare services so you could work or go to school?			
Did make any distributions from a retirement plan (401(k), IRA, etc.)?			
Did you contribute to a retirement plan (401(k), traditional/ROTH IRA, etc.)?			
Did you contribute to a Health Savings Account (HSA)?			
Did you have any distributions from your Health Savings Account (HSA)?			
Did you or your spouse give a gift(s) of more than \$17,000 to one or more people during 2023?			
Did you go through bankruptcy, foreclosure, repossession proceedings or had any debt cancelled (including credit cards)?			
Did you incur a loss because of damaged or stolen property?			
May the IRS discuss your tax return with your preparer?			
Were you a citizen of, have income from, or live in a foreign country?			
Do you want to electronically file your tax return?			

Note: If you answered YES to any of the above, please provide further details.

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Do you buy any internet merchandise for which you did not pay sales/use tax?					
Do you have any foreign bank accounts?					
Did you make any estimated tax payments? If yes, provide check date(s) and amount(s) of each check					
ES #1 _____	ES #2 _____	ES #3 _____	ES #4 _____		
Were you or any of your children attending college?					
Did you pay any sales tax on major purchases during 2023, such as a new vehicle, boat, motorcycle or manufactured home?					
Did you pay any real estate taxes on property?					
Did you make any cash or noncash donations to a 501(c)3 charity that you have?					
If yes, do you have proof for all charitable donations?					
Did you purchase or sell a home during the year? If yes, please provide a copy of the closing statement(s)					
Do you have a mortgage on your home in which you paid interest on?					
Did you make any energy-efficient improvements to your home?					
Did you have any gambling income and do you have proof of losses?					
Should you receive a refund, would you like it direct deposited into your bank account? If yes, provide bank information (VOID CHECK) with your tax documents					
Were you noticed by the IRS that the Earned Income Credit cannot be claimed in 2023?					
Can any of your dependents be claimed on someone else's tax return?					
Did you have health care coverage with a government Marketplace (Exchange) during 2023. Please provide Form 1095-A, issued by the Marketplace. In some family situations you may have more than one 1095-A.					
Are you claiming someone on your return who was included on another taxpayer's policy with the Marketplace? If so, then you will also need to send us a copy of that taxpayer's 1095-A.					
At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?					

Signature: _____ Date: _____

¹ Preexisting Alimony: Only alimony (court ordered/agreements) established prior to 2018 are deductible.

Note: If you answered YES to any of the above, please provide further details.