

2023 CLIENT QUESTIONNAIRE

		Personal Info	rmation	
Taxpayer &	Spouse Name:			_
Email: Phone:	Taxpayer:		Spouse:	
Ĺ	ress the same as las I Yes \square No (if no, p	•	ur current add	dress)
Address:				
City:			State:	Zip:
•	ming the same dep] Yes □ No □ N/A		•	ents you are claiming) Relationship:
- List SSN, Bir	rthdate & Relationship	only if new depende	ent (or you are a	new client)
☐ Check her SSN: Birthdate:	re if you are a new o	client and provi	de your SSN a Spouse	nd birthdate.
		Tax Refu	nds	
account □ Bank □ Bank Ro	re if you would like t and provide a voic c account is the san c Name: uting Number: nk Account Numbe	ded check or che ne as last year	_	

Tax Payments

☐ If you owe tax, check here if you would from your bank account and provide a vo ☐ Bank account is the same as last y	_
☐ Bank Name: Routing Number: Bank Account Number:	□ Checking or □ Savings
If we set up estimated (quarterly) taxes for instructed per our letter? \square Yes \square No (if no, please supp	or you for 2023, did you pay them as
	actions will be supplied in your letter) utomatically withdrawn from my bank account
Required Tax	Return Questions
At any time during 2023, did you have a over a financial account located in a foreign ☐ Yes ☐ No	financial interest in or signature authority ign country?
	ive (as a reward, award, or payment for property ise dispose of a digital asset (or a financial
Exchange (Marketplace)?	ance for any part of 2023 through the Healthcare <i>ur Form 1095-A to complete your tax return)</i>
Tax Return Si	ignatures & Copies
your tax return before we can electronica you would like to sign your signature for	thorization indicating that you have reviewed ally file your tax return. Please indicate below how m and receive your tax return. we need both spouse's email addresses)
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*If you choose electronic both you (and your spouse, if married) will receive two separate secure emails. The first email is to view **and download** your return and the second email will request your signature.

Commonly Missed Items

Indicate if any of the following occurred in 2023 and provide documents (or details, if documentation isn't available) with your tax information: ☐ Rent Paid for Residence (Wisconsin Residents) □ Bought or Sold Home ☐ Change in Marital Status □ Name changed with Social Security Administration ☐ Made gifts of over \$17,000 to any individual ☐ Received Unemployment Income ☐ You are claimed as someone else's Dependent ☐ Pay for Dependent Care Services ☐ Pay for expenses related to the Adoption of a Child □ Received notices from the IRS or State tax agencies ☐ Received Lottery or Gambling winnings ☐ Received income as Beneficiary of an Estate or Trust ☐ Paid College Tuition ☐ Paid Private School Tuition (Wisconsin) □ Contributed or Withdrew from Edvest Account (Section 529 Plan) ☐ Made Energy Efficient Improvements to home ☐ Are an Educator and had qualified Expenses used in Classroom **Questions & Comments** Questions/Comments - you can email us or use the space below to let us know if there is anything you would like us to review or that you would like to discuss while we are working on your taxes. We will contact you when we start working on your tax return.