

****THIS FORM NEEDS TO BE COMPLETED AND RETURNED WITH TAX DOCUMENTS****

(OR THIS FORM CAN BE COMPLETED AND DIGITALLY SUBMITTED ON OUR WEBSITE)

Are you claiming any dependents in 2023? - IF YES ADDITIONAL SHEET REQUIRED YES NO

Did you or spouse receive any unemployment income? If yes, please provide 1099G Yes No

Did you receive retirement or Social Security benefits?
If yes please include Statement from SSA-1099/1099-R Yes No

Do you have Medicare? (Social Security health insurance) Yes No

Do you have a health insurance you pay out of pocket?(secondary/supplement) Annual Amount _____ Yes No

Do you have Long Term Health Care policy? (Nursing Home Insurance) Yes No
Name(s) _____
Cost(per individual) _____

Did you purchase insurance through Market Place? Will need to provide 1095-A Yes No

Have you received any of the following 1099's: (Copies Needed)
1099-R - For distributions from Retirement accounts / including Roll Overs Yes No
1099-DIV - From Stock held Yes No
1099-INT - Interest Income from Banks, Stocks, ETC Yes No

Did you have a self employed business? Yes No

Have you filed a Schedule C, E or F in previous tax year? Yes No

Did you use a credit card processor for business? (You should receive a 1099-K) Yes No

Did you have any gambling winnings/losses? (If yes please include W2G's and loss documentation) Yes No

Did you have any Electronic/Virtual Digital Currency transactions? (Need documentation) Yes No

Did you sell any stocks, bonds, mutual funds or other assets? Will need to provide a 1099B Yes No

Did you make any contributions (outside of payroll) to any IRA in 2023? Yes No
Whose name is it in? _____
Is it a Traditional or Roth? _____
Amount of contribution(per individual) _____

Do you qualify for educator expense? (300 Fed- 500 Iowa) Amount claiming _____ Yes No

Did you make any cash donations? Amount _____ Yes No

Did you make any NON Cash donations? Value _____ (GoodWill, Salvation Army,Referral Center, etc) Yes No

Did you take early withdrawal or distributions from 401K and or Roll over a 401K — Need 1099-R	Yes	No
Do you have Mortgage Interest? Will need to provide 1098-INT	Yes	No
Do you have Real estate/Property Tax to deduct? Will need to provide documentation OR dollar amount \$ _____ If you live in ILLINOIS and pay property tax we will need your property ID #	Yes	No
Did you purchase any Residential Energy property? Will need proof of Energy Star Certification & Receipt. (Doors, windows, furnace, water heater, etc...)	Yes	No
Did you pay for daycare/child care expense? (Will need Name, SS/EIN, Address of provider & Amount) Need amount paid for each child	Yes	No
Were any of your dependents, you or your spouse in college in 2023?	Yes	No
Did you pay college tuition/expenses for yourself or dependent in 2023? Provide a 1098-T & Receipts	Yes	No
Have you taken American Opportunity or Lifetime Learning Education Credit on previous tax returns? (Need years taken-(per student)	Yes	No
Did you contribute/withdraw money from an educational IRA or 529 plan? Will need contribution letter/ 1098-Q	Yes	No
Did you pay interest on college loans? Will need to provide a 1098-E to report interest deduction	Yes	No
Did you have any debt cancelled/forgiven (credit card, etc.) or a mortgage principle reduction? Will need 1099-C	Yes	No
IA residents —Vehicle License Registration: Will need payment amount & documents if available	Yes	No
Did you pay Registration fees/tuition for your dependents, grades K-12? Need amount paid for each student	Yes	No
Did you contribute money to HSA account (Health Savings Account)? Will need to provide 5498-SA and/or 1099-SA	Yes	No
Did you operate any Rental Property during tax year?	Yes	No
Did you sell your primary home in 2023? How long did you live there? _____ Need a copy of the closing statement for sale of home and for NEW home you purchased.	Yes	No
Did you sell a second home or vacation home in 2023?	Yes	No
Have you moved to a different school district? - Need new school district(Iowa residents only)	Yes	No
Have you moved to a different state during 2023? –Need specific dates of residency	Yes	No
Are you a member/beneficiary of an S-Corp, Partnership, Estate, Trust, Etc? Include all K-1	Yes	No

Did you make any Estimated Quarterly payments for this tax year to Federal and/or State?	Yes	No
Dates _____		
Amounts paid _____		
Dates _____		
Amounts paid _____		
Do you require a Federal Identity PIN # to file your taxes? (A new <i>Pin Letter</i> required each year)	Yes	No
Are you a Volunteer Fire Fighter/EMS? (Letter Required)	Yes	No
We will need Documentation if claiming dependents other than your own children.		
We will need Legal Documents if you are acting as Power of Attorney for someone.		
Do you want a Paper Copy or Emailed Copy of your Tax Return?	Paper	Email
Do you want to receive our monthly Email Tax Tip Newsletter?	Yes	No
<i>Signature</i> _____		
<i>Date</i> _____		