

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

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

Did you or spouse receive any unemployment income? If yes, please provide **1099G**

Yes No

Did you receive retirement or Social Security benefits?

Yes No

If yes please include Statement from **SSA-1099/1099-R**

Do you have Medicare? (Social Security health insurance)

Yes No

Do you have a secondary/supplement insurance you pay out of pocket? Annual Amount \_\_\_\_\_

Yes No

Do you have Long Term Health Care policy?

Yes No

Name(s) \_\_\_\_\_

Cost(per individual) \_\_\_\_\_

Did you purchase insurance through Market Place? Will need to provide **1095-A**

Yes No

Do you purchase health insurance out of pocket? Amt. \_\_\_\_\_

Yes No

Have you received any of the following **1099's: (Copies Needed)**

**1099-R**

Yes No

**1099-DIV**

Yes No

**1099-INT**

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 **1099**

Yes No

Did you make any contributions (outside of payroll) to any IRA in 2022?

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 _____	Yes	No
Did you take early withdrawal or distributions from 401K and or Roll over a 401K — Need <b>1099-R</b>	Yes	No
Do you have Mortgage Interest? Will need to provide <b>1099-INT</b>	Yes	No
Do you have Real estate/Property Tax to deduct? Will need to provide documentation <b>OR</b> dollar amount \$ _____ If you live in <b>ILLINOIS</b> 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	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 2022?	Yes	No
Did you pay college tuition/expenses for yourself or dependent in 2022? Provide a <b>1098-T &amp; Receipts</b>	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/ <b>1098-Q</b>	Yes	No
Did you pay interest on college loans? Will need to provide a <b>1098-E</b> to report interest deduction	Yes	No
Did you have any debt cancelled/forgiven (credit card, etc.) or a mortgage principle reduction? Will need <b>1099-C</b>	Yes	No
IA residents —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 <b>5498-SA and/or 1099-SA</b>	Yes	No
Did you operate any Rental Property during tax year?	Yes	No
Did you sell your primary home in 2022? How long did you live there? _____ Need a copy of the closing statement for sale and NEW purchase.	Yes	No

Did you sell a second home or vacation home in 2022?	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 2022? –Need specific date	Yes	No
Are you a member/beneficiary of an S-Corp, Partnership, Estate, Trust, Etc? Include all <b>K-1</b>	Yes	No
<b>Did you make any Estimated Quarterly payments for this tax year to Federal and/or State?</b>	Yes	No
Dates _____		
Amounts paid _____		
Dates _____		
Amounts paid _____		
Do you require a Federal Identity PIN # to file your taxes? (Should receive a new <i>Pin Letter</i> each year)	Yes	No
Are you a <b>Volunteer</b> Fire Fighter/EMS? ( <b>Letter Required</b> )	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 <b>Paper</b> Copy or <b>Emailed</b> Copy of your Tax Return?	Paper	Email
Do you want to receive our monthly Email Tax Tip Newsletter?	Yes	No
<b>Signature</b> _____		
<b>Date</b> _____		