

## 2023 Repeat Client Questionnaire

Last Name: _____
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<b>Taxpayer 1:</b> <input type="checkbox"/> Main contact person First Name: _____ Phone: _____ Email: _____	<b>Taxpayer 2:</b> <input type="checkbox"/> Main contact person First Name: _____ Phone: _____ Email: _____
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Home Address: _____ _____, WI _____
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- Would you like a Tax Organizer sent next year for 2024's tax return?  Email  Mail  No
  
- Did you pay any estimated taxes that JLH told you to pay, or on your own?  Yes  No  
*(If yes, we need dates and amounts. Please attach paid vouchers or write out on paper)*
  
- For 2023, has your filing and/or marital status changed?  Yes  No  
*(If so, what changed? Please include divorce date, if applicable) \_\_\_\_\_*
  
- Dependent status:  I'm a dependent  I'm claiming dependents  N/A  
*(If this is a new dependent being claimed, we need the name, SSN, and date of birth. If the dependent status has changed for this tax year, please describe in the notes section on the back page)*
  
- Do you own your primary home or rent?  Own *(need Form 1098 Mortgage Interest)*  Rent  
 Rent amount per month \$ \_\_\_\_\_ X No. of months \_\_\_\_\_  
 Was heat included in your rent?  Yes  No
  
- Did you have Social Security Income?  Yes *(need SSA Form)*  No
  
- Did you have Unemployment Income?  Yes *(need 1099-G)*  No
  
- Did you have student loan interest?  Yes *(need 1098E)*  No
  
- Did you participate in any Crypto Currency activity?  Yes *(need excel file of sale info)*  No
  
- Did you pay child care or private school tuition?  Yes  No  
*(For daycare, we need facility name, Federal ID#, address, and amount paid for each child.  
 For private school, we need the tuition statement including what grade the child is enrolled in)*

**(Please flip over & complete other side)**

- Did you contribute to an IRA or an Edvest/Tomorrow's Scholar account?  Yes  No  
*(Please provide a statement showing contribution amounts or write at the bottom of this page)*
- Did you make an HSA contribution that's not reported on your W-2?  Yes  No  
*(We need this amount that was contributed if it was not done through your employer's payroll. If you took money out of your HSA account, please provide form 1099-SA)*
- Did anyone attend college last year?  Yes  No  
*(If yes, we need 1098T and any Edvest or 529 Plan forms and please fill in information below)*  
Has this student been consistently enrolled since they first enrolled?  Yes or  No  
When did the student first enroll? Season: \_\_\_\_\_ Year: \_\_\_\_\_
- Who provided your health insurance?  
 Plan through employer  Marketplace/ Obamacare (*need form 1095-A*)  Neither
- Did you have supplemental health insurance or long term care insurance?  
 Supplemental  Long-term care  Neither  
*(Please include amounts paid for each type of insurance, split by each taxpayer)*
- Did you receive any correspondence from any state or federal governing bodies last year?  
 Yes (*provide a copy of correspondence*)  No

**Direct Deposit Information:**

Use the same bank info as last year that JLH has?  Yes  No  Paper Check Requested  
Bank Name \_\_\_\_\_ Routing No. \_\_\_\_\_  
Account # \_\_\_\_\_  Checking or  Savings

*All of the information provided by me in this questionnaire (or any other accompanying or required documents) is correct, accurate and complete to the best of my knowledge.*

X \_\_\_\_\_  
Signature Date

**Extra notes you'd like for us to know/ watch for:**

*(For example: purchase or sale of home, passing of spouse, changes in dependent(s) etc.)*

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