

**QUESTIONS FOR THE PREPARATION  
OF YOUR 2023 TAXES**

NAME \_\_\_\_\_

DATE \_\_\_\_\_

**DO WE HAVE PERMISSION TO TEXT THE PHONE NUMBER WITH QUESTIONS, UPDATES AND WHEN YOUR TAX RETURN IS READY FOR PICK UP?**           YES           NO

PHONE NUMBER: \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

CELL PHONE NUMBER: \_\_\_\_\_

**DRIVERS LICENSE**

Driver's License # \_\_\_\_\_ Driver's License # \_\_\_\_\_

Date of Issue \_\_\_\_\_ Date of Issue \_\_\_\_\_

Date of Expiration \_\_\_\_\_ Date of Expiration \_\_\_\_\_

DID YOU HAVE UNEMPLOYMENT INCOME? \_\_\_\_\_

IF YOU PURCHASED ANY OF THE FOLLOWING WE WILL  
NEED INVOICES:

ARE YOUR DEPENDENTS THE SAME? \_\_\_\_\_

*A NEW HOT WATER HEATER, FURNACE, WINDOWS,  
ROOF, INSULATION, DOORS, SOLAR PANELS OR ELECTRIC CAR*

ADD: Name \_\_\_\_\_

Soc Sec # \_\_\_\_\_

Date of Birth \_\_\_\_\_

Lived with over 1/2 of the year \_\_\_\_\_

Can anyone else claim the dependent? \_\_\_\_\_

DO YOU HAVE A 1098-T FOR DEPENDENT CHILDREN IN COLLEGE? \_\_\_\_\_

IS YOUR ADDRESS THE SAME? \_\_\_\_\_

IS MARITAL STATUS THE SAME? \_\_\_\_\_

Spouse deceased in 2023 DOD \_\_\_\_\_

Divorced in 2023 As of \_\_\_\_\_

Legally Separated in 2023 \_\_\_\_\_

If no, when did you move? \_\_\_\_\_

**\*\*If yes, did you reside with your  
spouse for the last 6 months?** \_\_\_\_\_

DID YOU RECEIVE, SELL, SEND, EXCHANGE OR ACQUIRE ANY VIRTUAL CURRENCY?

BITCOIN

CYBERCURRENCY

CRYPTOCURRENCY

DIGITAL CURRENCY

DIGITAL WALLET

TO THE BEST OF YOUR KNOWLEDGE DO WE HAVE ALL OF YOUR TAX INFORMATION TO PROCEED WITH YOUR TAXES?

       YES           NO

***THE DIRECT DEPOSIT INFORMATION MUST BE PROVIDED ON THIS FORM IN ORDER TO  
RECEIVE DIRECT DEPOSIT REFUNDS –  
EVEN IF THE INFORMATION WAS PROVIDED IN PRIOR YEARS***

DIRECT DEPOSIT:    BANK: \_\_\_\_\_

       CHECKING           SAVINGS

RTN # \_\_\_\_\_

ACCT # \_\_\_\_\_

Signature \_\_\_\_\_

Referred by \_\_\_\_\_