

2022 Tax Questionnaire

Client(s) Name:				
Email:	ail:Home Address			
Home #:	Cell #:		Can we text you? Yes or No	
tax return electronically.	-	oy of both your and your spou	use's Driver's license to file your	
Bank Name				
Routing number		Account number		
If we have this information,	write <u>SAME</u> or you may j	provide the following informati	on:	
Please Circle your responses	:			
Did you receive a 1099K in 20)22? Yes or No			
Was anyone on your tax return	n pregnant after July 19th, 2	2022? Yes or No		
Did you have Marketplace Inst	urance? Yes or No Do	you have your 1095A? Yes o	r No	
Could another person claim an	y of the dependent childre	en listed on your tax return? Ye	es or No	
Have your dependents change	from last year? Yes or	No		
Did all dependents live with yo	ou for all twelve (12) mon	ths? Yes or No		
Do you have access to a foreig	n bank account? Yes or	No		
Did you receive or dispose of a	digital assets? (bitcoin, vb	ucks, etc.)? Yes or No		
Did you give money to charity	Yes or No If yes	, how much?		
If you <u>HAVE</u> a business, farm		_	or No	
Did you make any payments if	i 2022 ulat would require	you to file Form(s)1099? Yes	UT INU	

If yes, did you or will you file all required Form(s) 1099? Yes or No