

TAX QUESTIONNAIRE

This checklist is provided to help you gather the necessary information for us to prepare your 2023 income tax return. Return this list, along with the supporting documentation, to our office and let us know of any significant changes from your 2022 tax year.

PERSONAL INFORMATION

- Did your marital status change during the year?

If YES, **please explain:**

- Did your address change during the year?

If YES, **please explain:** _____

- Were you, your spouse, or any dependents issued an Identity Protection PIN?

If YES, **please explain:**

YES	NO

DEPENDENT INFORMATION

- Did you have any changes in dependents during the year?

If YES, **please explain:**

YES	NO

INCOME, PURCHASES, SALES & DEBT INFORMATION

- Did you start a new business or purchase any rental property or real estate during the year?
- Did you sell an existing business, rental property, or other property during the year?
- Did you retire, change employment, or receive unemployment benefits in 2023?
- Did you sell a principal residence during the year?

If YES, **provide closing documentation for the purchase and sale of the home.**

YES	NO

MISCELLANEOUS INFORMATION

- Did you receive, sell, send, exchange, or otherwise acquire any financial interest in Virtual currencies/**Crypto**? (Bitcoin-BTC, Dogecoin-DOGE/XDG, Coinbase, etc.)

- Did you make Gifts to any one person more than \$17,000 during the year?

If YES, **are you splitting the gift with your spouse?**

- Did you make any Estimates toward your 2023 taxes?

- Did you receive unemployment benefits? **If so, please explain:**

YES	NO

FOREIGN TAX INFORMATION

- Did you have a financial interest in or signature authority over a financial account or asset Located in a foreign country?

- Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?

- Did you work or earn income from and pay taxes to a foreign country?

- Did you own property in a foreign country?

YES	NO

Signed: _____

Date : _____