



2022 Tax Return Questionnaire

TAXPAYER

Name: _____

SSN: _____

Date of Birth: _____

Phone Number: _____

Email: _____

Preferred method of contact:

Phone Email Text Spouse

SPOUSE

Name: _____

SSN: _____

Date of Birth: _____

Phone Number: _____

Email: _____

Preferred method of contact:

Phone Email Text Spouse

<u>People you want to claim:</u>	<u>SSN</u>	<u>Date of Birth</u>	<u>In college?</u>
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	
_____	_____	_____	

Current Address: _____

Did you move during the year? Yes No If so, what date? _____

Did you have any bank accounts or income overseas? Yes No

Did you have any cryptocurrency transactions last year? Yes No

Did you make any of the following contributions and if so, how much?

401(k) 403(b) Traditional IRA \$_____ Roth IRA \$_____ HSA \$_____

Are you expecting a refund or to owe money? If so, how much? _____

How do you prefer to pay for your accounting services?

Debit/Credit Venmo/CashApp Email Cash/Check

When would you like your return filed? -----\$100 discount applies-----

ASAP March April May-June July-Sept October whenever

Other questions/comments/concerns: