



**2023 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

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

**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: