

Questions for 2023 Tax Returns

Please Check the appropriate box and provide all supporting documents

General

Do you have supporting evidence for all of your income and deductions

Yes

No

Direct Deposit

If you have a refund due would you like to use Direct Deposit

If you have a tax payment due would you like to use Direct Withdrawl

Health Care Information

Did you enroll for health care benefits through Marketplace Coverage with a provider or under healthcare.gov through the Affordable Care Act?

If applicable, tax return will not be accepted without this form.

Dependent Information

Did you have any additional dependents in the tax year?

Did you pay for dependent care while you worked?

Misc Information (if yes provide amounts)

Did you contribute to a College Savings Plan the year?

Did you contribute to a Health Savings Plan (HSA) this year?

Did you have any qualifying education expenses this year?

Did you contribute to a: IRA/ROTH IRA/SEP/SIMPLE/Qualified Plans?

*circle applicable plan and provide amounts