

2022 Tax Questionnaire

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Personal Information

- Did your marital status change during the year?
If "Yes," explain _____
- Can you or your spouse be claimed as a dependent by someone else?
If "Yes," explain _____
- Did your address change during the year?
If "Yes," please provide new address _____

Dependent Information

- Did you have any changes in dependents during the year?
If "Yes", please complete the attached dependent form
- Can another person qualify to claim any of your dependents?
If "Yes", please describe relationship of child to other person
- Did you have any childcare expenses during the year?
If "Yes", please provide amounts paid and childcare name, EIN, and address
- Did you have any children under age 19 or a full-time student under age 24 with more than \$2200 of unearned income?

Provide documentation for proof of dependent related credits (school records, medical records, daycare records, etc.)

Income

- Did you receive a form W2 from your employer?
If "Yes", please provide _____
- Did you receive any interest income?
If "Yes," provide 1099INT
- Did you receive any dividend income?
If "Yes," provide 1099DIV
- Did you receive any disability income during the year?
If "Yes," provide documentation.
- Did you receive income or incur expenses associated with a fantasy sport league?
If "Yes," provide documentation.
- Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?
If "Yes," attach Form 1099-MISC and Form 1099-K.
- Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?
If "Yes," attach Form 1099-K or Form W-2.
- Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?
If "Yes," provide documentation.
- Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?
If "Yes," attach Form 1099-K.
- Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)?
If "Yes," provide documentation.
- Did you receive any other income you have not provided information for with this organizer?
If "Yes," explain _____
- Did you buy or sell any stocks, bonds, or other investments during the year?
If "Yes", please provide 1099B
- Did you cash in any U.S. savings bonds during the year?
If "Yes," explain _____
- Did you receive any state or local income tax refunds from prior years?
If "Yes", please provide 1099G
- Did you receive any unemployment compensation for the year?
If "Yes", please provide 1099G
- Did you have gambling winnings or losses during the year?
If "Yes," provide W2G

Health Care Information

- Did any member of your household have healthcare coverage through the Marketplace?
If "Yes," provide copies of Form 1095-A.
- Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?
If "Yes", please provide statement or 1099Q
- Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
If "Yes", please provide amounts and documentation
- Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
If "Yes", please provide amounts and documentation

Household Information

- Did you sell a principal residence during the year?
If "Yes," provide closing documentation for the purchase and sale of the home.
- Did you refinance your principal home or second home or take out a home equity loan during the year?
If "Yes," provide all escrow, closing, and other pertinent documentation and information.
- Did you rent out your home or use it for business?
If "Yes," explain _____
- Did you sell, exchange, or purchase any real estate during the year?
If "Yes," explain _____
- Did you pay any real estate property taxes or personal taxes during the year?
If "Yes", please provide amounts and documentation
- Did you pay mortgage interest during the year?
If "Yes", please provide form 1098

Business Related Activities

- Did you start a new business or purchase any rental property during the year?
If "Yes", please provide information on new business _____
- Did you sell an existing business, rental property, or other property during the year?
If "Yes," explain _____
- Did you acquire a new or additional interest in a partnership or S corporation?
If "Yes," explain _____

Retirement Information

- Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year?
If "Yes", please provide form 1099R
- Did you make any contributions to, withdrawals from, or execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
If "Yes", please provide amounts and documentation
- Did you receive any Social Security benefits during the year?
If "Yes", please provide form 1099SSA

Education Information

- Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
If "Yes", please complete attached education form and provide form 1098T
- Did anyone in your household attend a post-secondary school during the year?
- Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
If "Yes", please provide form 1099Q
- Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?
If "Yes", please provide form 1098E

Miscellaneous Information

- Did you make cash donations to charity during the year?
If "Yes", please provide amounts
- Did you make noncash donations to charity (clothes, furniture, etc.) during the year?
If "Yes", please provide amounts and documentation
- Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies?
If "Yes", please provide amounts and documentation
- Did you incur a gain or loss due to damaged or stolen property?
If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements.
- Did you apply an overpayment of your 2019 taxes to your 2020 estimated taxes?
If you have an overpayment of 2020 taxes, do you want the refund applied to your 2021 estimated taxes?
- Did you make any estimated payments toward your 2020 taxes?
If "Yes", please provide amounts and documentation
- Do you want to have any refund or balance due directly deposited or withdrawn?
If "Yes", complete attached direct deposit form
- May the IRS discuss your tax return with your preparer?

Foreign Tax Information

- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
If "Yes", please provide amounts and documentation
- Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
If "Yes", please provide documentation
- Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?
- Did you have any income from, or pay taxes to, a foreign country?
If "Yes," explain _____
- Did you own property in a foreign country?
If "Yes," explain _____