

2023 CLIENT QUESTIONNAIRE

Client Name: _____

Phone: _____ Email: _____ Date: _____

1. Do you have a **NEW** Address or Phone Number? Yes / No Date of Move _____
NEW Address _____ NEW Phone _____
2. Are you claiming the same **dependents** as last year? Yes / No / NA
3. Direct deposit info: Checking / Savings (circle one) **Please attach voided check**
Routing # _____ Account # _____
4. Do you or have you ever **owned a Business/LLC/Rental**? Yes / No
5. Do you have any **miscellaneous income**? (*Gambling, UBER, Airbnb, Online, etc.*) Yes / No
If yes, provide 1099-Misc, 1099-NEC or 1099-K (see #5 on client letter for detail on 1099-K)
6. Did you do any **energy efficient** home improvements or purchase an electric vehicle? Yes / No
If yes, provide details.
7. Have you *or your dependents* received/sold/exchanged any form of **crypto currency**? Yes / No
8. Do you, your spouse, or dependents have health insurance through the **Government Marketplace**? Yes / No
If yes, please provide form 1095-A.
9. Do you have accounts that you are authorized to draw from that are held in a **foreign bank account**? Yes / No
10. Are you a beneficiary or executor for any **trusts or estates** this year? Yes / No
11. Did you have time off work or receive **unemployment** this year? Yes / No - **If yes, provide Unemployment 1099**
12. If you are divorced *and* are paying/receiving **alimony**, what is the date of your alimony decree? _____
13. Did you buy anything and **not pay sales tax** (NOT FARM)? Yes / No
14. Did you have any **debt forgiven* this year**? (*loans, credit cards, home, etc.*) Yes / No
(*Different than paid off)
15. Did you make any contributions or distributions to or from a **529 plan** (*college savings*)? Yes / No
If yes, please bring statements.
16. Did you pay any tuition for college **education**? Yes / No - **If yes, provide 1098-T**
17. Did you donate to any **charity**? Yes / No - **If yes, provide documentation or a summary**
18. Did you make contributions to or withdrawals from a **non-payroll IRA** this year? Yes / No Traditional / Roth
19. Did you **start** receiving Social Security in 2023? Yes / No
20. Do you have a **Health Savings Account**? Yes / No (*not a flexible spending account*) If yes, provide amount in/out and balance as of 12/31/2023.
21. Do you have **daycare** expenses for kids under age 13/disabled? Yes / No - **If yes, provide name, address, tax ID#**
22. Did you make **estimated tax payments** for 2023? None / IRS / State / City / School - **Provide checks/amount and date paid**
23. If you **own a business**, did you receive any Employee Retention Credits? Yes / No

**REMINDER THAT IF YOU HAVE ANY TAX CREDITS OR FILE AS HEAD OF HOUSEHOLD,
WE WILL NEED DOCUMENTATION AS OUTLINED IN THE ATTACHED LETTER.**