2023	TA	XES
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Client Tax Questionnaire

You will need:

- Tax Information such as Forms W-2, 1099, 1098, 1095.
- Social security cards or ITIN letters for all persons on your tax return.
- Picture ID (such as valid driver's license) for you and your spouse.

• Please complete pages 1-3 of this form.

 You are responsible for the information on your return. Please provide complete and accurate information.

• If you have questions, please ask the Tax Preparer.

	NOTE: Add	ditional Fees	Apply for R	Rental Pro	perties, Se	If Employn	ent Income	e, Forms K-1	Foreign Earn	ed Income Ex	clusions			
Part I – Your Personal Inform	nation (If you a	are filing a jo	oint returr	n, enter y	our name	es in the s	same orde	er as last ye	ear's return)					
1. Your first name			Last n	Last name				Da				Are you a U.S. citizen? ☐ Yes ☐ No		
2. Your spouse's first name			Last n	Last name			Da				Is your spouse a U.S. citizen? ☐ Yes ☐ No			
3. Mailing address						Apt #	City	•			State	ZI	P code	
4. Your Date of Birth	ur Date of Birth 5. Your job title				6. Last year, were you: a. Full-time student Yes No b. Totally and permanently disabled Yes No c. Legally blind Yes No									
7. Your spouse's Date of Birth 8. Your spouse's job title				b. '	Totally ar	nd permai	r spouse: nently disa		Yes □ N		-time stuc ally blind	lent 🗆 Ye		
10. Can anyone claim you or y		•	-	Yes	☐ No	☐ Uns								
11. Have you, your spouse, or	dependents b	een a victim	of tax re	lated ide	entity thef	t or been	issued an	Identity Pr	otection PIN	1?		☐ Ye	es 🗌 No	
Part II – Marital Status and	l Household	Informati	on											
1. As of December 31, 2023, w	hat 🗌 Ne	ever Married	l (Th	nis includ	des regist	ered dom	estic part	nerships, c	ivil unions, o	or other form	nal relatio	nships unde	r state law)	
was your marital status?	☐ Ma	arried	a. If Yes, Did you get married in 2023? ☐ Yes ☐ No											
			b. Di	d you liv	e with yo	ur spouse	e during a	ny part of t	he last six m	onths of		Yes □ No)	
	☐ Div	vorced	20)23? Dat	e of final	decree								
	□ Le	gally Separ	ated Da	ate of se	parate m	aintenand	e agreen	nent						
		idowed		ear of sp	ouse's de	eath								
2. List the names below of:														
 everyone who lived with you 	,	•	•	e)										
anyone you supported but	did not live wi	th you last y	/ear						To be co	mpleted by	/ Tax Pre	parer		
Name (first, last) Do not enter your name or spouse's name below	Date of Birth (mm/dd/yy)	Relationship to you (for example: son, daughter, parent, none, etc)	Number of months lived in your home last year	Citizen (yes/no)	Resident of US, Canada, or Mexico last year (yes/no)	Single or Married as of 12/31/23 (S/M)	Student last year	Totally and Permanently Disabled (yes/no)	Is this person a qualifying child/relative of any other person? (yes/no)	person provide more than 50% of his/	Did this person have less than \$4,700 of income? (yes/no)	Did the taxpayer(s) provide more than 50% of support for this person? (yes/no/N/A)	Did the taxpayer(s) pay more than half the cost of maintaining a home for this person?	
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	() 33,3)	(yes/no)		() 33,3,,	(yes/no)	
-														

Check	Check appropriate box for each question in each section							
Yes	No	Unsure	Part III – Income – Last Year, Did You <i>(or Your Spouse)</i> Receive					
			1. Wages or Salary? (Form W-2) If yes, how many jobs did you have last year?					
			2. Tip Income?					
			3. Scholarships? (Forms W-2, 1098-T)					
			4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)					
			5. Refund of state/local income taxes? (Form 1099-G)					
			6. Alimony income or separate maintenance payments?					
			7. Self-Employment income? (Form 1099-MISC, 1099-NEC, 1099-K, cash, digital assets, or other property or services)					
			8. Cash/check/digital assets, or other property or services for any work performed not reported on Forms W-2 or 1099?					
			9. Income (or loss) from the sale or exchange of Stocks, Bonds, Digital Assets or Real Estate? (including your home) (Forms 1099-S,1099-B)					
			11. Retirement income or payments from Pensions. Annuities, and or IRA? (Form 1099-R)					
			12. Unemployment Compensation? (Form 1099G)					
			13. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)					
			14. Income (or loss) from Rental Property?					
			15. Other income? (gambling, lottery, prizes, awards, jury duty, digital assets, Sch K-1, royalties, foreign income, etc.) Specify:					
Yes	No	Unsure	Part IV – Expenses – Last Year, Did You <i>(or Your Spouse)</i> Pay					
			1. Alimony or separate maintenance payments? If yes, do you have the recipient's SSN? Yes No					
			2. Contributions to a retirement account? TSP / 401(k) Traditional IRA Roth IRA Other					
			College or post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T)					
			eductions: Medical & Dental (including insurance premiums) Mortgage Interest (Form 1098)					
			☐ Taxes (State, Real Estate, Personal Property, Sales) ☐ Charitable Contributions					
			5. Child or dependent care expenses such as daycare?					
			6. For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?					
			7. Expenses related to self-employment income or any other income you received?					
			8. Student loan interest? (Form 1098-E)					
Yes	No	Unsure	Part V – Life Events – Last Year, Did You <i>(or Your Spouse)</i>					
			1. (HSA) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)					
			2. Have credit card, student loan or mortgage debt cancelled/forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A)					
			3. Adopt a child?					
			4. Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year?					
			5. Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)					
			6. Receive the First Time Homebuyers Credit in 2008?					
			7. Have health coverage through the Marketplace (Exchange)? [Provide Form 1095-A]					
			10. Receive a letter from the IRS or are missing Economic Stimulus Payments? (Qualified, but did not receive or did not receive full amounts)					

California Residents ONLY					
Yes No Unsure Part VI - Health Care Coverage - Last year, did you, your spouse, or dependent(s)					
1. Have health care coverage?					
□ □ □ 2. Receive one or more of these forms? (Check the box) □ Form 1095-B □ Form 1095-C					
□ □ □ 3. Have coverage through the Marketplace (Exchange)? [Provide Form 1095-A]					
□ □ □ 3a. (A) If yes, were advance credit payments made to help you pay your health care premiums?					
□ □ □ 3b. (A) If yes, Is everyone listed on your Form 1095-A being claimed on this tax return?					
□ □ 4. Have an exemption granted by the Marketplace?					
MILITARY ONLY					
Date of your last PCS Move: State of Legal Residency: You Spouse					
*From a tax standpoint, your State of Legal Residency (SLR) is considered your "domicile" or "resident" state as long as you are on active duty. Even if you are stationed in another state, you're still considered a resident of your SLR					
on active duty. Even if you are stationed in another state, you're state considered a resident of your older					
Part VII – Additional Information and Questions Related to the Preparation of Your Return					
1. Presidential Election Campaign Fund (<i>If you check a box, your tax or refund will not change</i>)					
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund You Spouse					
2. If you are due a refund, would you like: a. Direct deposit Yes No b. To purchase U.S. Savings Bonds c. To split your refund between different accounts Yes No					
3. If you have a balance due, would you like to make a payment directly from your bank account?					
1. Do you want a printed copy of your tax return mailed to your home?					
NOTE: \$30 processing fee applies. Please initial if you agree					
5. To e-sign your tax returns, provide e-mail addresses: You: Spouse:					
NOTE:You will receive your tax return(s) for review and signing, in electronic format, via e-mail.					
additional comments					
Upon completion of your tax returns, you will receive an invoice via e-mail with a link to pay online.					
Your prompt payment is appreciated. THANK YOU					
PREFERRED FORM OF PAYMENT: Direct Bank Payments Through 'ZELLE' OTHER FORMS ACCEPTED: PayPal, Visa or Mastercard Debit Cards					

CHECK THE STATUS OF YOUR REFUND AT WWW.IRS.GOV/REFUNDS