

2023 CLIENT QUESTIONNAIRE

*** CHECK ALL THAT APPLY TO YOUR TAX SITUATION**

INCOME SOURCE

- Employer W2's
- Unemployment
- Social Security (SSA-1099)
- Retirement plan Distribution (1099 R)
- Interest (1099 INT)
- Dividends (1099 DIV)
- Stock or mutual fund sales (1099 B/
Broker statements)
- Self-employment/ misc. income
(1099NEC/ 1099MISC)
- Expenses from self-employment
- Rental Property
- K1 (partnership, estate, trust income)

MEDICAL PREMIUMS

- Medical premiums out of pocket**
- Long term care insurance**

ITEMIZATIONS

- Donated cash/goods to a charity
- Paid Sales tax on a large purchase (car/
truck, etc.)
- Mortgage (1098)
- Property tax
- Large out of pocket medical expenses

HOUSEHOLD/DEPENDENT

- Changed marital or family status
- Adopted a child
- Had a new baby (Need SSA #)
- Paid child/dependent care expenses
- Paid Tuition (1098 T) and education ex-
penses
- Paid Student loan interest
- Enrolled in a health insurance plan
through the Federal or State MARKET-
PLACE (1095 A)**

- HSA contribution/distribution

MISCELLANEOUS

- Sold a home
- Paid/received Alimony Divorce date: _____
- Had gambling wins/losses (W2G and will
also need Win/Loss statement from Casino.)
- Made an IRA (**SELF**) contribution
- Received an IRS issued PIN #**
- Made estimated payments
- Had any cancellation of debt/foreclosure/
bankruptcy (1099 C)

**Do not leave these questions unanswered. The IRS requires every taxpayer to answer
"Yes" or "No" on Form 1040.**

- | | |
|---|---|
| <p>1. At any time during 2023, did you or your spouse: a) receive (as a reward, award, or payment property or services); or b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?</p> <p style="text-align: center;">YES NO</p> | <p>payment for property or services); or b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?</p> <p style="text-align: center;">YES NO</p> |
| <p>2. At any time during 2023, did your dependent: a) receive (as a reward, award, or</p> | <p>3. Did you have any interest/ signature authority over any foreign account or foreign trust?</p> <p style="text-align: center;">YES NO</p> |

SIGNATURE: