

2023 TAX INFORMATION SURVEY

Please fill out all relevant information to ensure we capture everything. Contact me at if you have any questions.

Part 1	Part 2	Part 3	Part 4	Part 5
Personal Information	Your Home	Income	Deductions	Miscellaneous

Your Name

First

Last

Your preferred email address

Spouse's preferred email address (if applicable)

Phone Number

Date of Birth for You (and everyone in family if applicable; please include names and corresponding DOB unless I have from prior year)

Part I: Personal Information

Were there any births, deaths, marriages, divorces or adoptions in your immediate family (only relevant for dependents claimed on tax return)?

- | | |
|---|-----------------------------------|
| <input type="checkbox"/> Not Applicable | <input type="checkbox"/> Marriage |
| <input type="checkbox"/> Birth | <input type="checkbox"/> Divorce |
| <input type="checkbox"/> Death | <input type="checkbox"/> Adoption |

If Yes to any of the above, please specify the circumstances.

What was your occupation in 2023?

What was your spouse's occupation in 2023? (if applicable)

Will you be claimed as a dependent by another taxpayer on their tax return (i.e. parent)? No Yes

Did you have dependent care expenses in 2023? No Yes

Which children does this apply to and how much did you pay for each child?

Note that day camp expenses for children under 13 qualify. School tuition only qualifies before kindergarten.

Do you have any children (under age 19 or college students under age 24) with unearned income in excess of \$1,250? (unearned income is investment income such as dividends, interest and capital gains) No Yes

Did you pay tuition to a college or graduate school program for yourself or a dependent in 2023? No Yes

Did you pay student loans for yourself or a dependent in 2023? No Yes

Were you and your family covered by health insurance for all of 2023? No Yes

Part 2: Your Home

Did you rent or own a home during 2023? Rent Own

How much rent did you pay in 2023?

Did you move during the year? No Yes

Address #1 in 2023

First date of residence in 2023 for Address #1

Address #2 in 2023

First date of residence in 2023 for Address #1

Part 3: Income

Were you or your spouse self-employed or had a side business in 2023? (check all that apply)

- No
- Yes, I was self-employed or had a side business
- Yes, my spouse was self-employed or had a side business

The business is structured as a:

- Sole Proprietorship
- LLC
- S Corporation
- C Corporation
- Partnership
- Other _____

How much personal funds did you put into the corporation in 2023 (aka Capital Contributions)? \$ _____

How much funds did you take out of the corporation in 2023 besides for wages paid to yourself (aka Capital Distributions)? \$ _____

Did you or your spouse receive a W-2? (check all that apply)

- I received a W-2
- My spouse received a W-2
- Neither received a W-2

Did you or your spouse receive 1099-R statements for Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.? No Yes

Did you or your spouse receive 1099-SSA statements for Social Security benefits received? No Yes

Did you (or your spouse) receive a 1099-DIV for Dividend Income? No Yes

Did you (or your spouse) receive a 1099-INT for Interest Income? No Yes

Did you (or your spouse) sell any stocks or bonds during 2023? No Yes

Did you (or your spouse) receive any of the following? (check all that apply)

- Alimony Received
- Scholarship (Grants)
- Unemployment Compensation
- Prizes, Bonuses, Awards
- Gambling, Lottery
- Unreported Tips
- Director/Executor's Fees
- Commissions
- Jury Duty
- Worker's Compensation
- Disability Income
- Veteran's Pension
- NONE OF THE ABOVE

Did you sell your home in 2023? No Yes

Did you rent out any real estate property in 2023? No Yes

Did you or your spouse receive a K-1? No Yes

Did you (or your spouse) receive employer-provided education assistance in 2023? No Yes

Did you (or your spouse) receive a 1099-Q for a distribution from a 529 Plan? No Yes

Did you (or your spouse) receive a damage award for personal injury, sickness or discrimination in 2023?

- No
- Personal Injury
- Sickness
- Discrimination

Did you incur an unreimbursed casualty or theft loss? No Yes

Did you have any debts cancelled or forgiven? No Yes

Did you go through bankruptcy proceedings? No Yes

Did you or your spouse make contributions to a non-deductible IRA in 2023? (i.e. Roth IRA) No Yes

How much did you contribute to your IRA in 2023?

How much did your spouse contribute to their IRA in 2023?

Did you or your spouse make contributions to a deductible IRA in 2023? (i.e. Traditional IRA) No Yes

How much did you contribute to your IRA in 2023?

How much did your spouse contribute to their IRA in 2023?

Did you (or your spouse) exercise any stock options in 2023? No Yes

Did you (or your spouse) receive as a reward or sell any cryptocurrency (i.e. Bitcoin) in 2023? No Yes

Part 4: Deductions

Did you make a Section 529 Plan contribution in 2023? No Yes

Did you pay any property taxes (other than real estate taxes) in 2023? No Yes

What were the property taxes for and how much?

Did you pay health insurance premiums for yourself and your family NOT through an employer plan?

No Yes

How much did you spend on health insurance premiums (and dental premiums) in 2023?

If you or your spouse are a teacher, did you pay for any unreimbursed Educator Expenses in 2023?

- No
- Yes
- Not Applicable

How much were your unreimbursed expenses? (The maximum deduction is \$300.)

Did you (or your spouse) make any contributions to an HSA account in No Yes

2023? How much did you contribute to your HSA?

Did your employer (or spouse's employer) make any contributions to an HSA account in 2023? No Yes

How much did your employer (or spouse's employer) contribute to your HSA?

Did you (or your spouse) pay alimony to another person? No Yes

Did you pay medical expenses that were NOT reimbursed or paid with pre-tax dollars?

- No
- Yes, I will enter amount below
- Yes, but not enough to get a deduction

Please enter your medical expenses below (insurance premiums DO NOT qualify)

Did you pay any investment interest expense? No Yes

Did you make any charitable donations in 2023? (check all that apply)

- No
- Yes, I donated money
- Yes, I donated non-cash items

Amount of Cash Donations

Amount of Non-Cash Donations

Did you (or your spouse) make any contributions to a self-employed SEP, SIMPLE or qualified plan?

No Yes

Part 5: Miscellaneous

At any time during the year did you have a combined \$10,000 or more in foreign bank accounts? No Yes

If you have an overpayment on your federal or state return, would you like to have the overpayment applied to next year?

- I prefer a refund
- Apply overpayment to next year

(Applicable to previous clients) Would you like to use a different bank account than last year for direct deposit of tax refunds or payment for tax liabilities? No Yes I'm a New Client

Do you accept that your bank account on file will be charged for your tax preparation fees? If not, please provide a new account. If you are a new client, please provide the account. No Yes I'm a New Client

Routing

Account

Did you pay quarterly estimated taxes during 2023? (This is different than taxes being withheld from your paycheck by your employer) No Yes

How much did you pay in quarterly estimated taxes? Please break down payments by date paid and list both Federal and State Payments

You will receive a digital copy of your tax returns after filing.

Do you want a paper copy of your tax return mailed to you as well? No Yes

Please provide any additional information you would like us to know.

Additionally, if you are a new client or you would like to use a different account from last year, please upload your bank account information to the client portal.