

2023 TAX QUESTIONNAIRE & THINGS TO BRING CHECKLIST

PERSONAL INFORMATION - PLEASE PRINT CLEARLY

	Taxpayer	Spouse
Last Name		
First Name		
Occupation		
E-Mail Address		
Cell Phone		
Home Phone		

HOME MAILING ADDRESS: _____

How would you like your completed tax return delivered to you?

Pick-up _____ USPS _____ DocuSign _____ (If you choose DocuSign, please provide your email address)

If you are due a refund, would you like your refund directly deposited into your account? YES _____ No _____

If you owe taxes, would you like your tax payments automatically withdrawn from your account? YES _____ No _____

If you answered "yes" to the above questions, please provide a cancelled check or your bank routing and account numbers.

DEPENDENT INFORMATION - Dependents you are claiming for 2023.

Name: _____ DOB: _____ Relationship: _____

Name: _____ DOB: _____ Relationship: _____

Name: _____ DOB: _____ Relationship: _____

Did any of your dependents attend college for 5 months or longer in 2023? YES _____ No _____

Did you pay childcare costs for a dependent child under age 13, or costs for caring for a disabled dependent or spouse?

Please provide statement with amount, provider name & address and ID number YES _____ No _____

IMPORTANT: If you answer "YES" to any of the following questions, it is your responsibility to provide the appropriate tax documentation to our office.

1. Did you receive any income from employment? **Form W-2** YES _____ No _____

2. Did you receive any unemployment compensation? **Form 1099-G** YES _____ No _____

3. Did you receive any awards, prizes, hobby income, gambling, or lottery winnings? YES _____ No _____

4. Do you have any interest or dividend income? **Form 1099-INT/1099-DIV** YES _____ No _____

5. Did you receive distributions from Partnerships, S-Corps or Trusts? **Form K-1** YES _____ No _____

6. Did you receive **Form 1099-MISC** for any miscellaneous income received? YES _____ No _____

7. Did you receive **Form 1099-NEC** for any non-employee compensation? YES _____ No _____

8. Did you have any debts cancelled or forgiven this year, such as a home mortgage, student loan or credit cards?

Form 1099-C/1099-A YES _____ No _____

9. Did you acquire or dispose of any stock during the year? **Form 1099-B** YES _____ No _____

10. Did you sell, exchange, or purchase any real estate or your principal residence during the year? We will need copies of Settlement Sheets and **Form 1099-S** if received. YES _____ No _____
11. Did you purchase a new plug-in electric vehicle? **Include Bill of Sale** YES _____ No _____
12. Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan? **Form 1099-R** YES _____ No _____
13. Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan? **Form 5498** YES _____ No _____
14. Did you receive Social Security/Disability Benefits? **Form SSA-1099** YES _____ No _____
15. Did you pay educational expenses during the year on behalf of yourself, your spouse, or a dependent? **Form 1098-T** YES _____ No _____
16. Did you make any withdrawals from an education savings or 529 Plan account? **Form 1099-Q** YES _____ No _____
17. Did you make any contributions to an education savings or Maryland 529 Plan account? YES _____ No _____
(Provide printed plan statements)
18. Did you pay any student loan interest this year? **Form 1098-E** YES _____ No _____
19. Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, attach **Form 1095-A** (Health Insurance Marketplace Statement) YES _____ No _____
20. Did you contribute to or receive a distribution from a Health Saving Account (HSA) for 2023? **Form 1099-SA and/or Form 5498-SA** YES _____ No _____
21. Did you pay long-term care premiums for yourself or family? YES _____ No _____
22. Did you pay any mortgage interest on an existing home loan? **Form 1098** YES _____ No _____
23. Did you take out a home equity loan or refinance a mortgage? YES _____ No _____
24. Did you pay out-of-pocket medical expenses? YES _____ No _____
(Co-pays, prescription drugs, glasses, etc.)
25. Did you make any cash or noncash charitable contributions? YES _____ No _____
26. Did you pay real estate taxes for your primary home and/or second home? YES _____ No _____
27. At any time during 2023, did you, or any of your dependents, receive (as a reward, award, or payment for property or services); or sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (Bitcoin, Ethereum, etc.) Huge Penalties if not reported. YES _____ No _____
28. Did you retire or change jobs this year? YES _____ No _____
29. Did you make any gifts totaling more than \$17,000 to any individual during 2023? YES _____ No _____
30. Did you make energy efficient improvements to your main/second home this year? YES _____ No _____
Include a copy of your invoice and proof of payment.
31. Did you make Federal and or State Estimated Tax Payments (Quarterly Tax Payments) for 2023? If yes, please provide the amounts and dates of payment. YES _____ No _____
32. Did you receive **Form 1099-K** for sales on eBay, Facebook Marketplace, etc. YES _____ No _____
Provide detail on cost basis of items sold.

NEW CLIENTS ONLY – Please provide a copy of your 2021 and 2022 tax returns and copies of your driver's licenses