

2023
TAX QUESTIONS

(Please complete and return this form with your tax information)

Name: _____

Cell # _____

Cell # _____

Home# _____

Work# _____

Circle one

- Yes or No** Did you have any transactions in a CRYPTO currency such as Bitcoin?
- Yes or No** Do you own any assets (land, bank accounts, etc.) in a Foreign Country or Foreign Bank, or receive any funds or gifts from a Foreign Person or Country?
- Yes or No Did your address change since the last tax return?
- Yes or No Did your marital status change during the year?
- Yes or No Were any children born or adopted this year?
- Yes or No Did any children start college **or** move out of your household this year?
- Yes or No Did any parents live with you or did you provide financial support for them during the year?
- Yes or No Is anyone in the family totally disabled? If so, do they receive disability income?
- Yes or No Did you receive an inheritance, alimony, jury duty, or lottery winnings?
- Yes or No** Did you begin or end a farm or business or an investment in a Partnership, LLC, or S-Corp?
- Yes or No Were any stocks, bonds, or other investment property sold during the year?
- Yes or No Did you purchase, sell or refinance any real estate this year (*settlement sheet needed*)?
- Yes or No Did you receive a distribution from a 401(K), profit-sharing plan, retirement plan, or individual retirement account (including Traditional, Roth, and Education IRAs)?
- Yes or No Did you convert from or contribute to a Traditional, Roth, Regular or Education IRA?
- Yes or No Did you contribute to a Health Savings Account (HSA)?
- Yes or No Was your home rented out or used for business during the year?
- Yes or No Did you add energy efficient improvements to your home this year (*Receipts are needed*)?
- Yes or No Were any gifts made to an individual or trust that totals more than \$17,000 for the year?
- Yes or No Did any children have investment (interest, dividends, etc.) income more than \$1,250?
- Yes or No Were you notified or audited by either the Internal Revenue Service or a State taxing agency?

(Please See Other Side)

2023 TAX FORMS AND INFORMATION NEEDED

- ✓ **1095A from the Health Insurance Exchange**
- ✓ W-2's from all Employers
- ✓ 1099-INT, 1099-DIV, 1099-R, 1099-SSA, 1099-S, 1099-K, 1099-NEC and/or 1099-MISC
- ✓ 1099-B and Cost Basis for each stock/bond sale.
- ✓ **1098-T AND proof of payment and receipts for books, tuition, and required fees paid for college.**
- ✓ 1098-E and/or statement of student loan interest paid.
- ✓ 1098's for mortgage interest and real estate taxes paid *or real estate bill for non-escrow accounts.*
- ✓ **Settlement sheets (HUD-1 Forms) from the purchase, sale, or refinance of any real estate.**
- ✓ List of unreimbursed medical expenses including, doctor, dentist, hospital, nursing homes, prescriptions, hearing aids, eye care, medical supplies, medical miles driven, and health and long term care insurance premiums.
- ✓ Summary of charitable donations **for which there are receipts**, and charitable miles driven.
- ✓ *Statement from Child Care Provider including the amount paid, name, address and tax ID# or Social Security Number of the provider.*
- ✓ Listing of unreimbursed teaching/education supplies.
- ✓ Miles driven for business/rental (**NOT** including to and from work) vehicle make and model _____
 Total Miles for 2023 _____ Business Miles for 2023 _____.
- ✓ Estimated Tax Payments made:

Federal		Due Date	State	
Date Paid _____	\$ _____	4/15/23	Date Paid _____	\$ _____
Date Paid _____	\$ _____	6/15/23	Date Paid _____	\$ _____
Date Paid _____	\$ _____	9/15/23	Date Paid _____	\$ _____
Date Paid _____	\$ _____	1/15/24	Date Paid _____	\$ _____

Notes: