



2023 Individual Federal and State Tax Return Questionnaire

If I have not prepared your prior year return, please provide a copy of it. **Adhering to, and completing this checklist will greatly facilitate the preparation of your tax return(s).** Please **review, complete and return this document** along with your tax paperwork:

Please remember to submit the following most common income items:

- W-2 forms for wages
- 1099 Div forms for dividend income
- 1099 Int forms for interest income
- 1099 R or SSA forms for retirement income
- Gambling Income
- 1099 Misc for rent income or 1099 NEC for non-employee compensation
- Tax refund form 1099 G for last year's refund
- Unemployment compensation
- Business income

Please remember to submit the following most common expenses to deduct (write amount in margin but I would also like to see the supporting document(s)):

- Real estate taxes
- Mortgage Interest (Form 1098) or interest expense paid on a financed RV*
- Contributions, please provide substantiation – cash or non cash*
- Business expenses (please provide detail)
- Gambling expenses
- If you, or your spouse, are full time educators, please inform me of your out-of-pocket expenses. There is a federal deduction and a \$100 credit on the Indiana return for eligible teachers
- Student loan interest on higher education debt, please provide form
- HSA distribution or contribution made by you (not your employer)
- Tuition or fees for higher education, please provide Form 1098-T
- Excise tax portion on your personal vehicles (your car registration)*
- Indiana taxpayers - Residential rent paid in 2023
- Any other deduction information – provide detail
- Indiana taxpayers - if your full-time student is either homeschooled or in private school (grades K-12) please advise.
- Contributions to a college 529 plan
- If you are an Ohio resident, please provide a copy of your driver's license.

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Medical expenses (prescription drugs, doctors, dentists, eyewear, miles on vehicle, etc.) generally cannot be deducted unless you incur a lot of unreimbursed expenses. This deduction is dependent upon income & whether you itemize.

*2023 Standard deduction amount: Single \$12,950 and MFJ \$25,900

If you start a new business & acquire a business EIN from the IRS, please advise.

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Please answer the following questions by writing 'yes', 'no' or the requested information in the margin.

- Did you adopt any child(ren) in 2023? If so, provide name and SS# or other ID#.
- Did your marital status change during 2023? If so, to what.
- Did your address change in 2023 or 2024? If so, please provide address and date it changed. The prior year's address will be used unless you tell me otherwise.
- Do you have any children under age 24 with interest, dividends or gains of over \$2,200?
- For new clients, what are the dates of birth for persons listed on your 2023 tax return?
- **Can you or your spouse** (not 'will you') be claimed as a dependent by another taxpayer?
- Are any of your dependents married? Do they have children?
- Were there any changes in dependents from the prior year? If yes, explain and if there is a new dependent, provide name, date of birth and SS#.
- Amount of child care paid while you worked or looked for work?
- Did you sell any assets in 2023 (house, stocks, business ownership or stock club ownership)?
- Did you pay any estimated tax payments towards 2023 taxes on the due dates of April 15th 2023, June 15th 2023, Sept 15th, 2023 or January 15th 2024? If so, please write the amount paid for federal and for state taxes.
- Did you make a large purchase in 2023 (car, boat, RV, etc.)? Provide sales tax paid on item.*
- Did you cash in any retirement funds early? If so, please provide name of company and how much. Please also provide the 1099-R form.
- What state were you a resident of as of December 31st?
- If you were part year residents, please provide dates of residency and the names of the states.
- What was your county of residence as of January 1, 2023?
- What was your spouse's county of residence as of January 1, 2023, if applicable?
- What school district do you currently live in?
- Did you have foreign income, pay any foreign taxes, or file any foreign information reporting or tax return forms? Provide details.
- **Did you have any interest in, or signature, or other authority over a bank, securities, or other financial account in a foreign country? Extremely large penalties for not reporting. Please notify me if you would like me to efile Form 114 for you.**
- Are you planning on contributing to a Roth IRA, deductible IRA or nondeductible IRA?
- Please provide amounts contributed to a section 529 college savings plan in 2023.
- If 529 college savings plan was an Indiana college choice plan, please provide account number.
- What bank account do you want your refund to be deposited? Provide the name of financial institution, account #, routing # and whether it is a checking or savings account.
- Did you install a new exterior door or window, AC unit, furnace, water heater or geothermal system (note: roofs do not qualify for an energy credit)?
- May I be authorized to speak to the IRS or state, on your behalf, in the event there are questions about your return?
- Did you or your spouse, if applicable, at any time during 2023, receive, sell, exchange or otherwise acquire any financial interest in virtual currency?
- If you purchased insurance from the exchange (a.k.a. marketplace health insurance), the premium assistance credit advanced to you during the year must be reconciled on your tax return. **Please provide Federal Form 1095-A.**

Please provide phone number(s) and the email address I may reach you most efficiently.

Please list any phone number or email address you **no longer** use.