

Print this form out, take some time to fill it out, and upload it to the portal or bring it with you when you come to the office. This will save you time and money and help us help you more effectively.

Tax Return Questionnaire - 2023 Tax Year

Name and Address:	Occupation	
Taxpayer:		
Address:		
Spouse:		
Address:		
Phone Numbers	Home:	Work:
Email Address:		

Do you wish \$3 to go to the Presidential Election Campaign? (Tax amount not affected) ☐ Yes ☐ No

Filing Status: ☐ Single ☐ Married ☐ Head of Household ☐ Qualifying Widow

Birth Date: Month, Day, Year **Yourself:** ____/____/____ **Spouse:** ____/____/____

DIGITAL ASSETS:

At any time during 2023, did you: (a) receive (as a reward, award, or 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)?

☐ Yes ☐ No

HEALTH INSURANCE COVERAGE:

Starting with the 2019 plan year, the Federal Shared Responsibility Payment no longer applies.

Some states, however, have their own individual health insurance mandate, requiring you to have qualifying health coverage or pay a fee with your state taxes. Please read the following statements carefully. More than one might apply to your "tax family."

1. If you had health care coverage with a government Marketplace (Exchange) during 2023. Please provide Form 1095-A, issued by the Marketplace. In some family situations you may have more than one 1095-A.

2. If you are claiming someone on your return who was included on another taxpayer's policy with a Marketplace. If so, then you will also need a copy of that taxpayer's 1095-A.

3. If a dependent filed a return for 2023, provide a copy of the return.

4. If you had compliant health insurance through an employer plan, private policy or with a government plan and provide Form 1095-B, 1095-C or other proof of insurance document.

5. If you were issued a hardship exemption by the Marketplace (Exchange). Provide all applicable exemption certificate numbers issued for each member of your family.

6. Complete the information below if you or any individual included in your "tax family" did NOT have insurance coverage for any month of 2023.

Please indicate any months that a member of your "tax family" was **NOT** insured.

Name: _____
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Name: _____
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Name: _____
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Name: _____
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

DEPENDENTS:

Name (First, Initial, Last)	Income Over \$2,500? (Y/N)	Date of Birth	Relationship	Months Lived in Home

INCOME:

1. Wages and Salaries (Attach W-2's)

Name of Payer	Gross Wages (Withheld)	Soc. Sec. (withheld)	Medicare (withheld)	Federal Income Tax (withheld)	State Income Tax (withheld)

2. Interest Income (Attach 1099's) *(List and identify as non-taxable Interest Income)*

[illegible]

3. If you received any interest from a "Seller Financed" mortgage:

Name and Address of Payor	Amount

4. Dividend Income (Attach 1099's)

Name of Payor	Amount	Name of Payer	Amount

5. Capital Gains and Losses:

Investment	Date Acquired	Cost or Other Basis	Date Sold	Net Sale Proceeds

6. Other Gains and Losses: *(Include details of dispositions of any business/rental/farm assets)*

Investment	Date Acquired	Cost/Other Basis	Date Sold	Sale Proceeds

7. Pensions, IRA Distributions, Annuities, and Rollovers

Total Received
 Taxable Amount (Attach all 1099's or other related papers).....

8. Rents/Royalties, Partnerships, S Corporations, Estates, Trusts

.....
 (Attach K-1's for all Partnerships/S Corporations/Fiduciaries)
 (Attach separate schedule(s) showing receipts & expenses for each rental property)

9. Unemployment Compensation Received

10. Social Security Benefits Received (Attach annual statement)

11. State/Local Tax Refund(s)

12. Other Income:

Description	Amount

CREDITS:

Child and Dependent Care:

(1) Number of Qualifying Individuals.....

(2) Name, address and identification number of each provider:

Name	Address:	Amount Paid

If payments were made to an individual, were the services performed in your home? ☐Yes ☐No

If "Yes," have payroll reports been filed? ☐Yes ☐No

Expenses incurred in connection with adoption.

"Special Needs" child ☐Yes ☐No

Tuition & Fees paid for higher education

(American Opportunity & Lifetime Learning Credits).....

Foreign Tax Credits.....

Attach detail of type foreign tax, country, and whether "withheld" or paid direct.

2023 Estimated Tax Payments

Federal	Amount	State	Amount

Other payments or credits - Attach schedule and explain... ..

ITEMIZED DEDUCTIONS:

Medical and Dental

Amount

1. Out of pocket costs for prescription medicines, drugs, insulin, doctors, dentists, nurses, and medical and dental insurance premiums (including Medicare B) paid in 2023 (reduce any insurance reimbursements)	
2. Transportation and lodging incurred to obtain medical care	
3. Other - hearing aids, eyeglasses, medical devices, etc.	

Taxes Paid in 2023**Amount**

1. State and local income taxes not listed elsewhere	
2. Real estate taxes not listed elsewhere	
3. Personal property taxes (includes owners tax on auto registration)	

Interest Paid in 2023**Amount**

1. Home mortgage interest paid to financial institutions	
2. Home mortgage interest paid to individuals	
Name:	
Address:	
3. Points paid on [] purchase [] refinance (include details)	
4. Investment Interest	
5. Student Loan Interest	

Automobile Use in 2023

To deduct mileage for auto expenses on a tax return, a log must be kept which details mileage driven for business purposes. This log, or something which keeps track of mileage, would be needed to justify the write-off for the expense in the event of an audit.

Car #1

Make	
Model	
Year	
<i>If the vehicle is being used by the owner, please provide the following information</i>	
Date of Purchase	
Purchase Price	

For the Period of Jan. 1, 2023, to Dec. 31, 2023**Amount**

Business Mileage	
Moving Mileage – only members of the Armed Forces on active duty who moved because of a permanent change of station	
Charitable Mileage	
Total Mileage	

Car #2

Make	
Model	
Year	
<i>If the vehicle is being used by the owner, please provide the following information</i>	
Date of Purchase	
Purchase Price	

*Commuting mileage must not be added to business mileage.

For the Period of Jan. 1, 2023 to Dec. 31, 2023**Amount**

Business Mileage	
Moving Mileage – only members of the Armed Forces on active duty who moved because of a permanent change of station	
Charitable Mileage	
Total Mileage	

Contributions: *(Written documentation is required for all gifts of \$250 or more)***Amount**

1. Cash - Less than \$3,000 paid to any one organization	
2. Cash - \$3,000 or more to any one organization -- show name of organization	
3. Other than cash - Attach details	

Casualty and Theft Losses - Attach Details.....

Miscellaneous Deductions: Eliminated for tax years 2018 through 2025 due to tax reform.

Employee Business Expenses - attach details	Amount
Reimbursed	0
Not Reimbursed	0
Job hunting expenses (list)	0
Other Expenses	0
Tax Preparation	0
Union Dues	0
Business Publications	0
Professional Dues/Fees	0
Safety Deposit Box Rental	0
Small Tools used in your trade or business	0
Business telephone	0
Uniforms & Cleaning	0
IRA Custodial fees	0
Investment Expenses	0
Education Expenses (attach details)	0
Business Entertainment	0
Other Miscellaneous deductions	0

Adjustments to Income:

	Maximize?	Amount
1. Your IRA deduction	<input type="checkbox"/> Yes <input type="checkbox"/> No	
2. Spouse's IRA deduction	<input type="checkbox"/> Yes <input type="checkbox"/> No	
3. Keogh SEP deduction	<input type="checkbox"/> Yes <input type="checkbox"/> No	
4. Penalty for early withdrawal of savings.		
5. Alimony paid - List name		
6. Self-employed health insurance premiums		

Did anyone in your family receive a scholarship of any kind during 2023?

If yes, please supply details. ☐Yes ☐No *(This includes athletic scholarships)*

If you have added or disposed of any fixed assets used in trade or business or rental or farm activities, please provide the following:

Addition: Description, Date acquired, cost (& trade-in, if any)

Dispositions: Description, Date of disposition, amount realized

***Note:** If we did not prepare your 2021 return, please provide the date acquired, cost, depreciation method used, and accumulated depreciation.*

If we have not previously prepared your return - please provide a copy of your 2020, 2021, 2022 tax returns.

Did you settle any notices or settle any tax examinations concerning your prior tax years' returns? ☐Yes ☐No

(If yes, please provide copy of notices, settlement reports, etc.)

Did you receive any payments from a pension or profit-sharing plan?

☐Yes ☐No (If yes, provide pertinent information or statements from the plan.)

Did you sell your primary residence during 2023? ☐ ☐No

Yes

If "Yes," provide a copy of the closing statements of the sale and a copy of the closing statement at the time of your purchase, details of any capital improvements you made during the time you owned the property, and any expenses of sale incurred by you. If you have purchased a replacement property indicate cost and date acquired. If you have previously sold a residence, provide a copy of Form 2119 from your tax return for the year of sale.

Did you change your state residency during 2023? ☐Yes ☐No

If "Yes" **AND** you were a member of the Armed Forces on active duty who moved because of a permanent change of station, please provide the following:

Previous address:	
Date of move:	
Distance:	miles
Costs of move:	
(describe)	

If you would like your tax refund (if any) deposited directly into your bank:

Account Type:	Your Account Number:	Bank Routing Number:
Checking <input type="checkbox"/> Savings <input type="checkbox"/>		

For the tax year 2023 (Provide details for any "Yes" response)

Did your principle residence (and second residence, if any) loan(s) exceed the fair market value of the residence?.....☐Yes ☐No

Do you have a balance borrowed against a home (equity line of credit) in excess of \$100,000, or total mortgage indebtedness in excess of \$750,000?... ☐Yes ☐No

Did you exercise any stock options?... ☐Yes ☐No

Did you purchase, sell, or do you own any bonds you paid more or less than the face amount? ☐Yes ☐No

Did you sustain any non-business bad debts?... ☐Yes ☐No

Did you or your spouse make any gifts in excess of \$17,000 to any one donee?..... ☐Yes ☐No

Were you the recipient of, or did you make a "below-market" or "interest-free" loan?... ☐Yes ☐No

Do you have a child under the age of 18 as of December 31, 2023, who has earned an income (interest, dividends, etc.) of more than \$1,150?..... ☐Yes ☐No

Did you lease a car which you used for business purposes?..... ☐Yes ☐No

If "Yes", provide (1) fair market value or capitalized cost of the car on the 1st day of the lease or rental agreement, (2) term of the lease, (3) number of payments made, (4) number of days the car was leased in 2023, (5) percentage of business use, (6) business or work the car was used in, (7) amount of expenses reported by you to your employer on Form W2.

Rental & Royalty Income and Expense

Property Type: ☐ Residential ☐ Commercial Location:

--

If Vacation Home:

Number of days rented	
Number of days used personally	

Property is owned by: ☐ Taxpayer ☐ Spouse ☐ Joint

Percentage ownership of not 100%: _____%

(Please indicate if income and expenses below are listed at 100% or your percentage.)

Did you live in part of the rental property?.....☐Yes ☐No

If yes, what percentage did you occupy as a tenant? _____%

☐ Check if rented to a related party.

Explain relation: _____

Income	Amount		
1. Rental income.			
2. Royalties received			
Expenses	Amount		Amount
1. Advertising		16. Property taxes	
2. Association dues		17. Utilities	
3. Auto miles driven		Other (description)	
4. Travel		18a.	
5. Cleaning and Maintenance		18b.	
6. Commissions		18c.	
7. Insurance		18d.	
8. Legal and professional fees		18e.	
9. Allocated tax preparation fees		18f.	
10. Licenses and permits		18g.	
11. Management fees		18h.	
12. Mortgage interest -- (Form 1098)		18i.	
13. Other interest		18j.	
14. Repairs		18k.	
15. Supplies		18l.	

Depreciation:

[illegible]

Business Income & Expenses (Sole Proprietorship)

Principle business or profession: _____

Business name: _____

Employer ID number: _____

Business address: City _____ State _____ Zip Code _____

Business is owned by: ☐ Taxpayer ☐ Spouse

Accounting Method: ☐ Cash ☐ Accrual

Inventory method: ☐ Cost ☐ Lower cost or market ☐ Other ☐ N/A

Did you materially participate in the business? ☐ Yes ☐ No

Check if this is the first year of the business. ☐

Income	Amount	Cost of Goods Sold	Amount
1. Gross receipts or sales		1. Beginning of year inventory	
2. Returns and allowances.		2. Purchases	
3. Other income.		3. Cost of items used personally	
		4. Cost of labor	
		5. Materials and supplies	
		6. Other costs	
		7. End of year inventory	

Expenses	Amount	Expenses	Amount
1. Advertising		21. Other taxes	
2. Bad debts (N/A cash benefits)		22. Licenses	
3. Commissions and fees		23. Travel	
4. Employee benefits		24. Meals and entertainment	
5. Health insurance		25. Utilities	
6. Other insurance		26. Wages	
7. Mortgage interest		27. Management fees	
8. Other interest		28. Consulting expenses	
9. Legal and accounting fees		29. Payroll service	
10. Allocation of tax preparation fees		30. Employee vehicle expense	

11. Office expense		31. Employee mileage reimbursement	
12. Pension and profit sharing plans		32. Client gifts (limited to \$25 each)	
13. Rent, vehicles		33. Education and seminars	
14. Rent, equipment		34. Other: (Description)	
15. Rent, building		35.	
16. Repairs & maintenance, building		36.	
17. Repairs & maintenance, equipment		37.	
18. Repairs & maintenance, vehicles		38.	
19. Supplies		39.	
20. Payroll taxes		40.	

Depreciation

Property	Date Acquired	Cost or Other Basis	Depreciation Method	Prior Depreciation

Farm Income & Expense

Principle Product: _____

Employer ID number: _____

Accounting method: ☐ Cash ☐ Accrual

Check if you materially participated in farm operations: ☐ Taxpayer ☐ Spouse

Income	Amount
1. Sales of livestock and other resale items	
2. Cost of above.	
3. Sales of livestock, produce, etc. you raised	
4. Cooperative distributions (1099-PATR)	
5. Cooperative distributions, taxable portion	
6. Agricultural program payments	
7. Agricultural program, taxable portion	
8. Commodity Credit Corporation Loans	
9. Crop insurance loans	
10. Custom hire	
11. Other:	

Expenses	Amount	Expenses	Amount
1. Car and truck expenses		19. Machinery and equipment rental	
2. Chemicals		20. Land rental	
3. Conservation expense		21. Other	
4. Custom hire (machine work)		22. Repairs and maintenance	
5. Employee benefit programs		23. Seeds & plants purchased	
6. Employee health insurance		24. Storage and warehousing	
7. Feed purchased		25. Supplies purchased	
8. Fertilizers and lime		26. Payroll taxes	
9. Freight and trucking		27. Other taxes	
10. Gasoline, fuel, and oil		28. Utilities	
11. Other insurance			
12. Mortgage interest			
13. Other interest			
14. Labor hired			
15. Legal & Professional fees			
16. Allocated tax preparation fees			
17. Pension & Profit Share Plans			
18. Vehicle rental			

Depreciation

Property	Date Acquired	Cost or Other Basis	Depreciation Method	Prior Depreciation

Business Use of Home

Do you use any part of your home regularly and exclusively for business? ☐ Yes ☐ No

Estimated percentage of time spent in home office compared to total time spent in this business activity. (e.g., 10%, 20%):

Description of work done in home office:

Description of work done outside of work office:

Total area of home:

Total area of home used regularly for business:.....

	<u>Direct costs</u> (benefit only business portion of home)	<u>Indirect costs</u> (other)
Home insurance		
Repairs and maintenance		
Utilities		
Rent		
Other.		

If Daycare Facility:

Days used as a daycare facility.	
Prior year carryover of unallowed losses	

Cost of home and improvements and prior depreciation.				
Depreciation of home, improvements, furniture, and equipment.				
Property	Date Acquired	Cost or Other Basis	Depreciation Method	Prior Depreciation

Household Employees: (Nanny Tax)

Did you pay a household employee at least \$2,600 this year? ☐ **Yes** ☐ **No**
(e.g., housekeepers, nannies, nurses, yard workers, health aides, babysitters)

If yes, please provide the following information for each:

Name		Federal Income tax withheld	
		Social Sec. tax withheld	
Wages paid		Medicare tax withheld	
		State income tax withheld	

Employer Identification Number (you can no longer use your Social Security number):

Has W-2 been filed?	Yes []	No []
If no, do you want us to prepare for you?	Yes []	No []
Have the necessary state employment returns been filed? If	Yes []	No []
No, do you want us to prepare for you?	Yes []	No []
Was the household employee under eighteen years of age and a student?	Yes []	No []

