



## REQUIRED TAX QUESTIONS

CLIENT NAME: \_\_\_\_\_

	PLEASE CHECKMARK BOX IN RESPONSE TO THE QUESTIONS ASKED	YES	NO
1.	Have you had a change of filing status from last year?		
	If so, please let us know the date of the status event:  a. Married? _____ b. Divorced? _____ c. Widowed? _____ Deceased Date: _____		
2.	Have you had any new children this past year?		
	Please list full name including middle:  a. Child's Name: _____ b. Birth date: _____ c. SSN: _____		
3.	Any childcare expenses? If so, we need documentation of Provider Name, Address, EIN, and amount spent (per child).		
4.	Have you purchased any "real" property this year? If so, we will need purchase documents and closing statements.		
5.	Have you sold any "real" property? If so, we will need the original purchase documents and the selling documents.		
6.	Have you purchased any vehicles or equipment for your business? If so, we will need purchase documents.		
7.	Did you make any contributions to an HSA? If yes, you must be qualified to contribute; <b>NOT</b> on Medi-Share, Medicare, etc. and plan type is correct (Individual vs. Family). If so we need Form 5498-SA.		
8.	Did you make HSA distributions to pay qualified expenses? If so, provide Form 1099-SA.		
9.	Did you have Marketplace Health Care Insurance? If so, we need Form 1095-A.		
10.	Did you have any out of state income? If so, we will need a copy of your driver's license and your spouse's.		



	PLEASE CHECKMARK BOX IN RESPONSE TO THE QUESTIONS ASKED	YES	NO															
11.	Did you have any foreign accounts?																	
12.	Do you have any crypto currency?																	
13.	Do you have any nonfungible tokens (NFT's)?																	
14.	Did you make any contributions to a retirement plan outside of your regular paycheck?																	
15.	Did you setup a business retirement plan in any year 2020-2023 <b>AND</b> have start-up expenses paid in 2023?																	
16.	Did you make any energy efficiency improvements to your home in 2023 (e.g. windows, doors, insulation, etc.)																	
17.	Did you install any renewable energy equipment on/in your home in 2023 (e.g. solar panels, heat pumps, pellet stoves, wind energy)?																	
18.	Did you buy an <b>ELECTRIC-ONLY</b> or <b>PLUG-IN</b> hybrid vehicle in 2023?																	
19.	Please confirm which account you want a refund electronically deposited into: BANK NAME: _____ TYPE OF ACCOUNT: <input type="checkbox"/> CHECKING ROUTING NUMBER: _____ <input type="checkbox"/> SAVINGS ACCOUNT #: _____																	
20.	Please list dates and amounts of each estimated tax payment: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">QUARTER</th> <th style="width: 30%;">DATE</th> <th style="width: 40%;">PAYMENT</th> </tr> </thead> <tbody> <tr> <td>1ST QUARTER</td> <td>___/___/___</td> <td>\$ _____:_____</td> </tr> <tr> <td>2ND QUARTER</td> <td>___/___/___</td> <td>\$ _____:_____</td> </tr> <tr> <td>3RD QUARTER</td> <td>___/___/___</td> <td>\$ _____:_____</td> </tr> <tr> <td>4TH QUARTER</td> <td>___/___/___</td> <td>\$ _____:_____</td> </tr> </tbody> </table>			QUARTER	DATE	PAYMENT	1ST QUARTER	___/___/___	\$ _____:_____	2ND QUARTER	___/___/___	\$ _____:_____	3RD QUARTER	___/___/___	\$ _____:_____	4TH QUARTER	___/___/___	\$ _____:_____
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21.	Do you have a Financial Advisor? If so, could you please provide their name and the company with which they are affiliated? Advisor's Name: _____ Company Name: _____																	
22.	Do you have an Attorney? If so, could you please provide their name and the company with which they are affiliated? Attorney's Name: _____ Company Name: _____																	