

# Tax Return Preparing Questionnaire

for tax year of 2023

Name of Self: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

If married,  
your spouse Name: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Curren Address: \_\_\_\_\_ Email: \_\_\_\_\_

( Please circle the question number if your answer is "YES" )

1. Did you purchase a house in tax year of 2023?
2. Did you buy a car in tax year of 2023? If it's a new plug-in electric vehicle?  
Purchased Date \_\_\_\_\_ The brand of the vehicle \_\_\_\_\_ The model of the vehicle \_\_\_\_\_
3. Did you receive Unemployment Compensation (form 1099-G) or repay them? Workers' Compensation?
4. Did you receive tips and gratuities not reported on Form W-2?
5. Did you have any Jury Duty-Election Board Fees?
6. Did you sell your principal residence in 2023?
7. Can you be claimed as a dependent on another person's tax return for 2023.
8. Were you granted stock options by your employer and/or exercised employer stock options?
9. Did you (or do you plan to before April 15, 2023) contribute to a traditional IRA or Roth IRA for 2023?  
**Self:** Traditional IRA \$ \_\_\_\_\_ Roth IRA \$ \_\_\_\_\_ **Spouse:** Traditional IRA \$ \_\_\_\_\_ Roth IRA \$ \_\_\_\_\_
10. Did you convert a traditional IRA or roll a qualified plan distribution to a Roth IRA in 2023?  
If yes, amount converted/rolled over: \_\_\_\_\_
11. 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)?
12. For the entire year, did you, your spouse and your dependents have health care coverage provided by either an employer or the government (Medicare, Medicaid or VA), or did you receive an advance premium for health insurance purchased through a Health Insurance Marketplace for yourself or a family member through the Health Insurance Marketplace (Exchange)? If yes, please have form 1095-A available.
13. Were you in the military (or reservist)? Were you an active-duty member of the military and moved pursuant to a military order and incident to a permanent change of station?
14. Are you a National Guard member or an Armed Forces reservist and travel more than 100 miles and stay overnight to perform duties?
15. Have you (or your spouse) received an Identity Protection Personal Identification Number (IP PIN) from the IRS?  
If yes, enter six-digit code: **Self:** \_\_\_\_\_ **Spouse:** \_\_\_\_\_
16. Did you have a retirement plan withdrawal, rollover, or lump-sum distribution in 2023?
17. Did you (or do you plan to before April 15, 2023) contribute to a health saving account (HSA)/ an Archer Medical Savings Account (MSA) for 2023?  
Amount of contribution: (do not list employer contributions, including amounts you elected to contribute under a cafeteria plan, shown on your Form W-2)  
**Self:** \$ \_\_\_\_\_ **Spouse:** \$ \_\_\_\_\_ Type of health plan coverage: Self-only \_\_\_\_\_ Family \_\_\_\_\_
18. Did you receive any distributions from your health savings account (HSA)/an Archer Medical Savings Account (MSA)?  
Amount of distributions: \$ \_\_\_\_\_ Amount of unreimbursed qualified medical expenses (attach list): \$ \_\_\_\_\_
19. Did you pay any medical expenses from your pocket in 2023? Deductible only if net expenses exceed 7.5% of Adjusted Gross Income (AGI). If yes, please consider: Health Insurance Premiums but not through the Health Insurance Marketplace, Medicare Insurance Premiums (SSA-1099), Long-Term Care Insurance Premiums, Prescribed Drugs and Insulin, Doctors and Clinics, Dentists and Orthodontists, Glasses, Contact Lenses, Eye Exams, Laser Eye Surgery, Hospitals, Nurses, Ambulance, Nursing or Long-Term Care Facility, Medical Miles Driven in 2023, Parking, Lodging While Obtaining Medical Treatment Limited to \$50 per night, per person.
20. Are you a K-12 teacher? If yes, enter amount of out-of-pocket classroom costs you paid: \$ \_\_\_\_\_

21. Did you pay child care costs for a dependent child under age 13, or costs of caring for a handicapped dependent or spouse, so you could work, attend school or look for a job? If yes, provide the amounts paid for each individual and the names, addresses, and taxpayer identification number of the care providers.  
Amount, if any, reimbursed by an employer dependent care plan \$ \_\_\_\_\_
22. Did you pay expenses related to adopting of a child? If yes, provide details of any expense incurred (attach list).
23. Did you pay or receive alimony? (Do not include child support). Pay \_\_\_\_\_ Receive \_\_\_\_\_  
To/From: Name \_\_\_\_\_ Social Security Number \_\_\_\_\_ Amount \$ \_\_\_\_\_  
Date of original divorce or separation agreement: \_\_\_\_\_
24. Did you pay any individual \$2,600 or more to perform household services during the year, such as babysitter, care-taker, housekeeper, cook or gardener?
25. Did you perform services in the performing arts for at least two employers.
26. Did you receive a Paycheck Protection Program loan for your Schedule C business?  
Amount \$ \_\_\_\_\_ Amount forgiven \$ \_\_\_\_\_
27. Did you have any debts cancelled or reduced (including credit cards and student loans), property repossessed or foreclosed upon, or did you file for bankruptcy?
28. Do you (T) [or your spouse (S)] want to designate \$3 to the Presidential Election Campaign Fund? (Does not change amount due or refund.) Leave blank if neither wished to designate \$3.
29. Do you want to allow your preparer or another individual to discuss your federal return with the IRS and state return with the state tax authorities? Provide name, phone number, and personal identification number of individual if not preparer.  
Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_ Identification Number: \_\_\_\_\_
30. Was any debt on your principal residence reduced or forgiven? If yes, provide details.
31. Were there any births, marriages, or divorces etc. in your immediate family during the year?
32. Did you incur education costs for yourself, your spouse or your dependents?
33. Did your children under age 19 (or age 19-23 and full-time students) have unearned income over \$1,250.00?
34. Did you rent for more than 5 months?
35. Did you refinance your residence or take a home equity loan in 2023?
36. Did you receive a notice from the IRS or other taxing authority?
37. Did you earn income or pay taxes in another country?
38. Did the IRS disallow EIC in prior year?
39. Did you make a contribution to a College Savings Plan?
40. Did you receive a first-time homebuyer credit for a home purchased in 2008? If yes, enter the amount of the credit \_\_\_\_\_
41. Did you purchase any energy-efficient improvements such as solar electric, solar water heating, fuel cell, small wind energy, geothermal heat pump, or biomass fuel property, or energy-efficient exterior doors, windows, insulation, heat pumps, furnaces, central air conditioners, or water heaters?
42. Did you make gifts to a trust or gifts totaling more than \$17,000.00 to any individual during the year? If so, provide recipient's name, address, relationship to you and the amount of the gift.
43. Did you own any securities or held any debts that became worthless during the year?
44. Did you contribute to or received distributions from an Achieving a Better Life Experience (ABLE) account?
45. Did you receive Installment Sales payment in 2023?
46. Did you live or work in a foreign country during 2023?
47. Do you have financial accounts maintained by a foreign (non-US) bank or financial institution that totaled more than \$50,000 on the last day of the year or more than \$75,000 at any time during the year (\$100,000 and \$150,000, respectively, if married filing a joint return)?
48. Did you receive a distribution form, or were you the grantor of, or a transferor to, a foreign trust?
49. Did you have a financial interest in, or signature authority over, a financial account (such as a bank or securities account) located in a foreign country at any time during 2023? A financial account is located in a foreign country if it is physically located outside of the U.S., including an account maintained with a branch of a U.S. bank that is physically located outside of the U.S.  
If yes, did the aggregate value of all accounts located in a foreign country (other than accounts maintained on a U.S. military installation) exceed \$10,000 at any time during the year?
50. Did you own any other foreign financial assets (such as stock in a foreign corporation or an interest in a foreign partnership) that are not held in a financial account?
51. Are you a U.S. person who, during the current tax year, received either:
- More than \$100,000 from a nonresident alien individual or a foreign estate (including foreign persons related to that nonresident alien individual or foreign estate) that you treated as gifts or bequests; or
  - More than \$18,567 from foreign corporations or foreign partnerships (including foreign persons related to such foreign corporations or foreign partnerships) that you treated as gifts.