

Yes Check box if **YES** or you have a question. If answer is **NO** or **N/A**, please **leave BLANK**.

- 1 Check: I want my return copy to be [ ] paper mailed, [ ] pdf e-mailed, or [ ] both (\$35).
- 2 [ ] Will ALL income be reported to the tax preparer, taxable or not? If no, explain \_\_\_\_\_
- 3 [ ] If you need this return by a specific date, provide date & reason. \_\_\_\_\_
- 4 [ ] Did you receive or sell or otherwise dispose of a digital asset (Bitcoin)?
- 5 [ ] Are you waiting on any Form W-2's, 1099's, 1095's, 1098's or K-1's (as of the appt date)?
- 6 [ ] The following has changed since last year: marital status, last name, address, e-mail,  
bank account, someone claimed me as a dependent on their return, loss of dependent.
- 7 [ ] Is anyone on this return NOT a US citizen or legal resident alien?
- 8 [ ] Does anyone reside with you that is NOT listed as a spouse or dependent?
- 9 [ ] Were there any births, adoptions, marriages, divorces, or deaths? Date \_\_\_\_\_
- 10 [ ] Did anyone buy health insurance from the Obama Exchange? If yes, attach all Form 1095-As.
- 11 [ ] Has anyone on this return filed their own return? If yes, please provide a copy.
- 12 [ ] Did you receive any correspondence from IRS or a state since we last met?
- 13 [ ] Has IRS issued you an Identity Protection Pin to combat ID theft? T\_\_\_\_\_ S\_\_\_\_\_
- 14 [ ] Do you want us to prepare any state or franchise tax returns? Which states? \_\_\_\_\_
- 15 [ ] Were you the grantor or beneficiary of a FOREIGN (non-USA) trust, estate, or gift?
- 16 [ ] Do you have any financial investments whose statements do NOT have a US return address?
- 17 [ ] Have you ever declared bankruptcy or filed IRS Form 982? If yes, when? \_\_\_\_\_
- 18 [ ] If required, did you file all Form 1099-NEC's and W-2's by January 31, 2023?
- 19 [ ] Did you or your spouse claim the first time homebuyer credit in 2008?
- 20 [ ] Has an extension been filed? How much did you pay with the extension? \_\_\_\_\_
- 21 [ ] Did you receive or make gifts over \$16,000 to any one person, including your spouse?
- 22 [ ] Did you do any trading or belong to a barter club?
- 23 [ ] Did you pay an employee more than \$2400 to work in your home (sitter, nurse, cook, maid)?
- 24 [ ] Do you have a dependent under age 24 with investment (not wage) income over \$2300?
- 25 [ ] Did you reside in or own a business in a federally declared disaster area?
- 26 [ ] Did you purchase any asset needing a state license, such as a car, boat, RV, motorcycle?
- 27 [ ] Do you have a home equity, RV, or boat loan? (Circle) [ ] If yes, is it over \$100K?
- 28 [ ] Did you borrow or loan over \$10,000 to a relative or your business?
- 29 [ ] Do you have any BUSINESS loans guaranteed or co-signed by someone else?
- 30 [ ] Do you rent or lease any property to relatives, your corporation, or your partnership?
- 31 [ ] Did you start a new business, LLC, or farm; buy a rental; or invest in a new K-1 entity?
- 32 [ ] Did you sell, trade, or cease using any assets on your depreciation schedule(s)?
- 33 [ ] Did you have any debt refinanced, canceled, or forgiven this year, including credit cards?
- 34 [ ] Did you buy, sell, exchange, repossess or foreclose any real estate, including your home?
- 35 [ ] Did you sell or trade any investments (such as stocks, collectibles, coins, metals)?
- 36 [ ] Did you have any bad debts or investments that became worthless?
- 37 [ ] Did you make any payments on loans you had co-signed for someone else?
- 38 [ ] Did you exercise (purchase) or sell stock options issued by an employer?
- 39 [ ] Was any money withdrawn from an IRA, where the proceeds were sent directly to a charity?
- 40 [ ] Was any money withdrawn from an IRA, Sec. 529 plan, HSA, MSA, 401K, ROTH, annuity, life  
insurance, education IRA, or pension, where you have **NOT** provided us a Form 1099?
- 44 [ ] Did you receive any of the following? Please circle which ones. Scholarships, UBER,  
child support, disability, VA income, insurance or legal settlements, prizes, damages,  
jury duty, alimony, election work, unemployment, income from hobby, tips, garage sales,  
gambling/lottery winnings, sales on eBay, state tax refund, PPP loan forgiven
- 42 [ ] Did you have any of the following? Please circle. alimony paid, solar panels, child care,  
adoption costs, casualty or theft loss, student loan interest, K-12 teacher supplies,  
post high school tuition, long term health care, home energy improvements.
- 43 [ ] Did you or will you invest in an IRA, ROTH, HSA, SEP, SIMPLE, myRA, or KEOGH?
- 44 [ ] If you deduct ANY expenses for business meals, do you maintain the detailed WRITTEN  
information that IRS requires?
- 45 [ ] If you deduct any expenses for business vehicles or computers, do you keep logbooks or  
other WRITTEN evidence showing the business use? If yes, provide copy of one page.
- 46 [ ] For charitable donations, do you have a receipt or document for EACH gift over \$250?

I have reviewed the questions answered here and the data in the accompanying tax organizer (if any) and to the best of my knowledge it is true, correct, and complete. I have also read the professional services agreement printed on the back of this page and agree to its provisions.

Signature \_\_\_\_\_ Date \_\_\_\_\_