

Client Questionnaire- 2023

Personal Information	YES	NO
- Are you married?		
- Did your address change in 2023?		
- Can you be claimed as a dependent by another?		
- Did your bank account change from the prior year? (2022 on file)		
Dependent Information		
	YES	NO
- Did you have a new child in 2023? (Fill out new Info on Basic Worksheet)		
- Do you pay for college for yourself or child/children?		
- Do you have any other dependents? (mother, father, relative, etc.)		
- Did any of your dependents have income?		
- Did you pay student loan interest for yourself or child? (Upload 1098-E)		
- Will you or have you contributed to a Coverdell or 529 Plan?		
- Did you maintain a home for someone else other than a dependent?		
- Did you pay for childcare? (Fill out info on Basic Worksheet)		
Purchases, Sales and Debt Information		
	YES	NO
- Did you start or end a business during the year? Sole Proprietorship?		
- Did you acquire an interest in a LLC, Partnership or C Corp or S Corp? (Upload K1)		
- Did you start an LLC or Corporation? (See page 3)		
- Did you buy or sell any real estate? (Upload HUD1 or Closing Statement)		
- Did you sell any stock or mutual funds during the year? (Upload 1099-B)		
- Do you buy Cryptocurrency or Bit Coin?		
- Did you use Cryptocurrency to purchase anything?		
- Did you sell Cryptocurrency or Bit Coin? (Upload 1099-B or pertinent gain/loss info)		
- Did you purchase an Electric or Hybrid clean vehicle? (Upload Purchase Agreement)		
- Did you purchase a hybrid or green appliances? (Upload receipt)		
Income Information		
	YES	NO
- Did you receive any wages or W2s? (Upload W2)		
- Did you receive 1099s? have self-employment income? (Upload 1099-MISC or NEC)		
- Did you receive any interest or dividends? (Upload 1099-INT or 1099-DIV)		
- Did you receive any lump sum distributions from a pension or 401K? (Upload 1099-R)		
- Did you make a withdrawal or roll-over from a retirement plan? (Upload 1099-R)		
- Did you receive any unemployment income? (Upload 1099-G)		
- Did you receive or pay alimony? What year is the divorce agreement? _____		
- Did you have any cancellation of debt? (credit card, mortgage, etc.) (Upload 1099-C)		
- Do you have rental income? (Upload Schedule E Worksheet)		
- Did you receive any awards from lawsuits? (Upload 1099-MISC)		
- Did you receive any Social Security Income? (Upload SSA-1099)		

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Deduction Information		YES	NO
-	Did you incur a casualty or theft loss?		
-	Do you own a home? (Upload 1098 Mortgage Interest Statement)		
-	Did you buy a new home? (Upload HUD1 or Closing Statement)		
-	Do you have a Home Equity Line of Credit? (Upload 1098 Mortgage Interest Stmt.)		
-	Did you pay for PMI? Private Mortgage Insurance?		
-	Did you make any cash/non cash charity donations? (See page 3)		
-	Did you work out of town during the year?		
-	Did you or your dependents go to college? (Upload 1098-T)		
-	Do you have any medical expenses? (See page 3)		
-	Did you pay for long term care premiums?		
-	Do you have a HSA or a MSA? (circle one) (See page 3)		
-	Self employed, did you pay for private healthcare for you or family? (See page 3)		
Credit Information		YES	NO
-	Have you started an adoption process?		
-	Do you have Covered CA insurance? (Upload 1095-A & CA-3895)		
-	Did you or will you start a new retirement plan this year?		
-	Did you make any Quarterly Estimated Payments? see below**		
Misc. Information		YES	NO
-	Are you in the military?		
-	Did you make any gifts more than \$17,000?		
-	Are you covered by a pension plan?		
-	Did you make a SEP, Traditional or Roth IRA contribution? (circle one) (See page 3)		
-	Do you have money in a foreign bank account? (See page 3)		
-	Do you expect any significant changes in the next year? (please explain)		
	Upload all correspondence from the IRS and the FTB.		
-	Do you want to file electronically?		
Stimulus And Estimated Quarterly Info		YES	NO
*	Did you receive the Middle Class Tax refund or the "Gas Refund"?		
*	How much was it? (Upload the 1099-G from CA)		
		Federal	CA
**	How much did you pay for Q1 (due 4/18/23)		
**	How much did you pay for Q2 (due 6/15/23)		
**	How much did you pay for Q3? (due 9/15/23)		
**	How much did you pay for Q4? (due 1/16/24)		

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Deduction Information		
Purchases, Sales and Debt Information		
-	Did YOU start an LLC or Corporation? Are you the only shareholder/Partner?	Yes or No
-	Entity Name:	
-	Address:	
-	EIN:	

Purchases, Sales and Debt Information	
	<i>Donations under \$250. Use separate sheet for more than 3 donations.</i>
-	Cash Donation
-	Cash Donation
-	Cash Donation
	<i>Any donations over \$250 please upload donation letter. (Required)</i>
	<i>Non Cash Donations</i>
-	Name of Organization
-	Address of Organization
-	Description of Donated Items
-	Original Purchase Cost
-	Today's Approx. Thrift Store Value

Medical/Dental Expenses	
-	Doctor, Dentist, Hospital Fees
-	Insurance Premiums (do not include if you have a 1095-A, Covered CA)
-	Medical Aids (Glasses, Contacts, Hearing Aids)
-	Parking Fees & Tolls
-	Prescription Medicines & Drugs
-	Medical Miles Driven

-	HSA or a MSA (Circle what applies) Single or Family plan?
-	Contribution Amount
-	Did you make a SEP, Traditional or Roth IRA contribution (circle one)
-	Contribution Amount and Date

Further explanations:	
-	How much money do you have in a foreign account? (Upload 12/31/23 Bank Statement)
-	How much did you pay for Health Care Premiums for you and your family?
other-	
other-	
other-	