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Helping you prepare today & relax tomorrow

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2023 Income Tax Preparation Questionaire & Organizer

This document is meant as a guideline for helping you organize your tax information.

It is not intended to replace original documentation. ***PLEASE READ IT CAREFULLY!***

TAXPAYER NAME:________________________SSN____________________DOB_________________

SPOUSE NAME:_____________________________SSN____________________DOB_______________

Current Address: ____
City: ___________________________________ State: _________ Zip: ______________________
Preferred Phone:(_____) ___________________________________ Cell ☐ Work ☐ Home ☐
Alternate Phone:(_____) ___________________________________ Cell ☐ Work ☐ Home ☐
Email Address:____

DEPENDENT CHILDREN:

Name:______________________________ SSN:______________________ DOB:____________________
Name:______________________________ SSN:______________________ DOB:____________________
Name:______________________________ SSN:______________________ DOB:____________________
Name:______________________________ SSN:______________________ DOB:____________________

DID YOUR MARITAL STATUS CHANGE SINCE YOUR 2021 RETURN? **YES**☐ **NO**☐
IF DIVORCED IN 2023, PLEASE PROVIDE FINAL DATE____

DID YOU HAVE ANY CHANGES TO DEPENDENTS FROM YOUR 2021 TAX RETURN? IF YES, UPDATE BELOW.

IF ADDING A DEPENDENT, PROVIDE NAME_________________SSN_________________DOB_____________
IF ADDING A DEPENDENT, PROVIDE NAME_________________SSN_________________DOB_____________

IF REMOVING A DEPENDENT, PROVIDE NAME_____________________________________
IF REMOVING A DEPENDENT, PROVIDE NAME_____________________________________

Please include a copy of your (and your spouses) driver's license
****We will need a copy of your 2022 Tax Return****

1. **Would you like your refund to be DIRECT DEPOSITED into a bank account?**

YES__☐___ **NO**__☐___

BANK NAME:______________________________________

ROUTING NUMBER:________________________ **ACCOUNT #:**______________________________

CHECKING____☐____ **SAVINGS**___☐____

Deposit slips will NOT be accepted as they have a different routing number than checks.
This information *MUST* be *verified YEARLY* due to constant banking changes.
If NO Banking information is provided above or verified with preparer,
you will receive a paper check.

Any additional information pertaining to the preparation of the tax return or the filing of the return:

____

____

____

Do you want a PAPER copy of your completed tax return? **YES**_☐_**NO**__☐_

Do you or your spouse have an Identity Theft Pin #? **YES**_☐_ **NO**_☐_

If **YES**, please provide the 2023 letter with the number

2. **Did you make any Estimated Tax Payments for 2023?**

If YES:

	Federal		State	
1st Qtr:	Amt Pd_________	Date Pd________	Amt Pd_________	Date Pd________
2nd Qtr:	Amt Pd_________	Date Pd________	Amt Pd_________	Date Pd________
3rd Qtr:	Amt Pd_________	Date Pd________	Amt Pd_________	Date Pd________
4th Qtr:	Amt Pd_________	Date Pd________	Amt Pd_________	Date Pd________

INCOME

3. How many W-2's do you (and your spouse) have in 2023? _________________
*Please provide all ***(W-2)*** forms

4. Did you (or your spouse) receive **interest** from a bank account or other financial institution? (include regular, tax exempt and bond interest) *Please provide all **(1099-INT)** forms **YES**_☐_ **NO**_☐_

5. Did you (or your spouse) receive dividends from investments? **YES**_☐_ **NO**_☐_
*Please provide all **(1099-DIV)** forms

6. Did you (or your spouse) **receive or pay alimony** during 2023? *If YES, please provide: YES___ NO___

Ex-Spouses Name:_____________________ **Amt paid or received**: $______________

SSN:________________________ **Date divorce was finalized**: ____________________

7. Did you (or your spouse) operate a sole proprietorship, single member LLC or other unincorporated business during 2023 ***(Schedule C)*** ? YES___ NO___

*If YES, please provide **detailed income and expense summary for each business**

8. Did you (or your spouse) **sell stock, securities or mutual funds**? YES___ NO___

*Please provide all ***(1099-B)*** forms & cost basis info

9. Did you (or your spouse) **sell or purchase** a principal residence, 2nd home, timeshare, cottage, etc? YES___ NO___

*If YES, please provide **date and closing documents**

10. Did you (or your spouse) receive payments from a **pension**, **profit sharing** or other **employer sponsored plan**? YES___ NO___

*Please provide all ***(1099-R)*** forms

11. Did you (or your spouse) receive **payments** from an **IRA**, **Roth IRA** or other **qualified plan**? *Please provide all ***(1099-R)*** forms YES___ NO___

12. Did you (or your spouse) **purchase**, **sell** or have **income** from a **rental property** ***(Schedule E)*** ? YES___ NO___

*If yes, please provide **detailed income and expense summary for each property**

13. Did you (or your spouse) receive **unemployment benefits** in 2023? YES___ NO___

*Please provide all **(1099-G)** forms

14. Did you (or your spouse) receive S**ocial Security** benefits? YES___ NO___

*Please provide all ***(SSA-1099)*** forms

15. Did you (or your spouse) have any **gambling income** during 2023? YES___ NO___

*Please provide all ***(W-2G)*** forms

16. Did you (or your spouse) **acquire interest** in or have **income** from **Partnerships, Estates or Trusts**? YES___ NO___

*Please provide all ***(K-1)*** forms from 1065 or 1041

17. Did you (or your spouse) acquire interest in or have income from S-Corporations? *Please provide all **(K-1)** forms from 1120S YES___ NO___

Adjustments to Income and Earnings

18.

a) SEP or Simple IRA contributions (not IRA or Roth) YES___ NO___
b) Self-employed health insurance premiums? YES___ NO___
c) IRA or Roth IRA contributions? (not SEP or Simple) ***(Form 5498)*** YES___ NO___
d) Student loan interest paid? (If **YES**, please provide **Form(s)** ***1098-E***) YES___ NO___

Income and Earnings Information (Special)

19. Did you (or your spouse) receive income from any of the following situations?

a) Gambling winnings **not** reported on form W-2G? **YES**___ **NO**___

b) Other income reported on **1099-MISC** Box 3? (*Please provide form) **YES**___ **NO**___

c) Qualified tuition program earnings? ***(Form 1099-Q)*** **YES**___ **NO**___

d) *Child's investment income in excess of $2,200.00* (including unemployment)? **YES**___ **NO**___

e) Jury duty income? **YES**___ **NO**___

f) Cancelled Debts? ***Form 1099-C*** *or* ***Form 1099-A*** **YES**___ **NO**___

g) Do you have any foreign bank/financial accounts? **YES**___ **NO**___

h) Other income? (please provide details) **YES**___ **NO**___

Client notes pertaining to Income and Earnings Information (Special)

____

____

____

IF YOU FEEL YOU MAY ITEMIZE, PLEASE ANSWER THE FOLLOWING- IF NOT, GO TO #30

20. Did you (or your spouse) pay medical expenses *out of pocket* ? **YES**___ **NO**___

***(Not reimbursed or paid form a health savings account)**

21. Did you (or your spouse) pay *real estate taxes* on any real property which you own? **YES**___ **NO**___

(primary residence, 2nd home, family cottage, timeshare, etc) ***If yes, please provide paid tax bills**

22. Did you (or your spouse) pay any personal property taxes based on the value of the property? ***(plate fees for autos, boats and other vehicles)** **YES**___ **NO**___

23. Did you (or your spouse) pay any other taxes you feel may be deductible? **YES**___ **NO**___

***Provide details**

24. Did you (or your spouse) make payments on a 1st or 2nd mortgage, refinance or take out a home equity loan? ***(Equity loans must be used for purchase or improvement of the property)** ***Provide all *1098* forms** **YES**___ **NO**___

25. Did you (or your spouse) make payments on a mortgage that was ***NOT*** reported on a form 1098? (Land contract or other) ***If yes, please provide information** **YES**___ **NO**___

Name:_______________________________________ SSN# ____________________________

Address: ____

26. Did you make any CASH Contributions to any charity in 2023? **YES**___ **NO**___

*** If YES, please provide statements from charity**

27. Did you (or your spouse) make NON-CASH contributions to a qualified charity? **YES**___ **NO**___

***If YES, please provide receipt (THESE AMOUNTS MAY NOT BE ESTIMATED)**

28. Did you (or your spouse) donate a vehicle to a qualified charity? **YES**___ **NO**___

If YES, please provide statement from charity and form *1098-C

Other Deductions and Misc. Expenses

29. Did you (or your spouse) receive Health Insurance through the Marketplace? **If YES, please provide 1095-A form** **YES**☐ **NO**☐

30. Gambling **losses** to the *extent of winnings* ? **YES**☐ **NO**☐

31. Other expenses you feel may be deductible? **YES**☐ **NO**☐

32. Are you a **Renter**? (Michigan residents only) **YES**☐ **NO**☐

If YES, please provide the following:

Landlord Name:____

Landlord Address:____

Monthly Rent:_________________ # of months you paid rent in 2023?________

33. Did you (or your spouse) pay **Higher Education Expenses** that were not covered by scholarships or qualified tuition payment plans? **YES**☐ **NO**☐

Please provide all Form 1098-T, 1099-Q and all relevant records pertaining to the tuition paid

*****Please note:*** New due diligence rules require that in addition to the 1098-T that you MUST provide, you must also provide proof of payment in the form of a statement from the school or cancelled checks and receipts for tuition and qualified expenses**

34. Do you (or your spouse) have an **HSA** account? **YES**☐ **NO**☐

If YES, did you (or your spouse) use it in 2023? **YES**☐ **NO**☐

Please provide *<u>(1099-SA)</u>

35. Did you pay **Child Care Expenses**? **YES**☐ **NO**☐

***If YES, please provide documentation from the care provider**

Other information you feel we should be aware of for your 2023 Income Tax Preparation?

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Advantage Tax and Financial Services

Date______________ Client Number 23-__________

Client Name(s)____

You have requested our firm's assistance with preparation and filing of your 2023 Federal and State income tax returns. In addition to preparing your returns for filing, we will supply you with an electronic copy of the returns for your records.

We are required by law to file most income tax returns electronically. If your return cannot be filed electronically, or you request a waiver from the electronic filing requirement, we may require your approval and signature on a waiver document. In this case, we will supply you with paper copies and envelopes for sending to the appropriate Federal and State agencies.

You agree to pay our fee once your returns are completed and provide us with a signed e-file authorization form. Unless other arrangements have been made in advance, we require full payment of preparation fees before we file your returns.

We will prepare your returns based on information you provide. You agree that you will provide all requested documents and answer all questions truthfully and completely, so we can accurately prepare your returns. Preparation of your tax returns does not imply any verification or other assurances related to the information you provide, and we will not perform any auditing functions related to this engagement. You acknowledge that it is your responsibility to provide all documentation and verification of items on your returns in the case of an audit or other inquiry from a government agency. Note that some items such as auto expenses, travel expenses, business income and expenses and certain charitable contributions require contemporaneous written records to allow a deduction. You also agree to inform us of any foreign bank accounts or investment accounts you own or have signature authority over.

Information you provide will be kept confidential. However, our discussions are not protected by any form of attorney-client privilege. We will advise you to consult with an attorney at any time we feel it may be appropriate.

This agreement covers only the preparation of your tax return and does not apply to services related to an audit of the return by a government agency, additional correspondence with a government agency, or other services that may be required after filing of your returns. If additional services are required, a separate agreement will be executed and additional fees may be incurred.

IMPORTANT

We must have the Client Questionnaire filled in completely to prepare your returns.

At any time during 2023, did you (or your spouse) receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency (such as cryptocurrency)? **YES**___☐___ **NO**___☐___

At any time during 2023, did you or your spouse have access to or signature authority over any foreign bank or investment accounts? **YES**___☐___ **NO**___☐___

We (I) have read and agree to the terms of this agreement and acknowledge receiving a copy of Advantage Tax Service's Office Privacy Policy.

Client Signature	Date	Preparer Initial
Client Signature	Date	