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Advantage Tax & Financial Services

Helping you prepare today & relax tomorrow

www.advantagetaxservice.net

2023 Income Tax Preparation Questionnaire & 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!

CLIENT NAME(S)

DID YOUR ADDRESS, PHONE OR EMAIL CHANGE IN 2023? IF YES, UPDATE BELOW.

Address: _____ City/St/Zip: _____

Preferred Phone: (____) _____ Cell _____ Work _____ Home _____

Alternate Phone: (____) _____ Cell _____ Work _____ Home _____

Email: _____

By giving a cell number, I agree to receive marketing and informational text messages throughout the year from Advantage Tax & Financial Services at the number I provided. Msg & data rates may apply. Reply STOP to no longer receive messages.

DID YOUR MARITAL STATUS CHANGE IN 2023? IF YES, UPDATE BELOW.

IF MARRIED, PROVIDE SPOUSE'S NAME _____ SSN _____ DOB _____

IF DIVORCED, PROVIDE FINAL DATE _____

DID YOU HAVE ANY CHANGES TO DEPENDENTS FROM YOUR 2022 TAX RETURN? IF YES, UPDATE BELOW.

IF ADDING A DEPENDENT, PROVIDE NAME _____ SSN _____ DOB _____

IF REMOVING A DEPENDENT, PROVIDE NAME _____

***Please include a copy of your (or your spouse) driver's license if we do not have a copy or it was renewed in 2023**

1. Do you or your spouse have an Identity Theft Pin #? If YES, please provide the 2023 letter with the number

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

YES _____ NO _____ CHECKING _____ SAVINGS _____

BANK NAME: _____

ROUTING #: _____ ACCOUNT #: _____

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.

3. Do you want a PAPER or ELECTRONIC copy of your completed tax return?

PAPER _____ Electronic _____

4. **Did you (or your spouse) 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 _____

5. How many W-2's did you (or your spouse) have in 2023? _____

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

of W-2's _____

6. 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 _____

7. Did you (or your spouse) receive **dividends** from investments?

YES _____ NO _____

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

8. 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: _____

9. 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**

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

YES _____ NO _____

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

11. 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**

12. 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

13. Did you (or your spouse) receive **payments** from an **IRA, Roth IRA** or other **qualified plan**?

*Please provide all **(1099-R)** forms YES _____ NO _____

14. 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**
15. Did you (or your spouse) receive **unemployment benefits** in 2022? YES _____ NO _____
 *Please provide all (**1099-G**) forms
16. Did you (or your spouse) receive **Social Security** benefits? YES _____ NO _____
 *Please provide all (**SSA-1099**) forms
17. Did you (or your spouse) have any **gambling income** during 2023? YES _____ NO _____
 *Please provide all (**W-2G**) forms
18. 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
19. Did you (or your spouse) **acquire interest** in or have **income** from **S-Corporations**? YES _____ NO _____
 *Please provide all (**K-1**) forms from 1120S

Income and Earnings Information (Special)

20. 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? (<u>Form 1099-Q</u>) | YES _____ NO _____ |
| d) <i>Child's <u>investment</u> income in excess of \$2,200.00</i> (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)

Adjustments to Income and Earnings

21. Did you (or your Spouse) make contributions or get distributions from any of the following?
- | | |
|---|--------------------|
| 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) (<u>Form 5498</u>) | YES _____ NO _____ |
| d) Student loan interest paid? (If YES, please provide Form(s) 1098-E) | YES _____ NO _____ |

IF YOU FEEL YOU MAY ITEMIZE, PLEASE ANSWER THE FOLLOWING- IF NOT, GO TO #31

22. Did you (or your spouse) pay medical expenses out of pocket? YES_____ NO_____
*(Not reimbursed or paid from a health savings account)
23. Did you (or your spouse) pay real estate taxes on any real property which you own? YES_____ NO_____
(primary home, 2nd home, family cottage, timeshare, etc) *If yes, please provide paid tax bills
24. Did you (or your spouse) pay any personal property taxes based on the value of the property? YES_____ NO_____
*(plate fees for autos, boats and other vehicles)
25. Did you (or your spouse) pay any other taxes you feel may be deductible? YES_____ NO_____
*Please provide documentation
26. Did you (or your spouse) make payments on a 1st or 2nd mortgage, refinance or take out a home equity loan? YES_____ NO_____
*Provide all 1098 forms
*(Equity loans must be used for purchase or improvement of the property)
27. Did you (or your spouse) make payments on a mortgage that was **NOT** reported on a form 1098? (Land contract or other) YES_____ NO_____
*If yes, please provide information
Name: _____ SSN# _____
Address: _____
28. Did you (or your spouse) make any CASH Contributions to any charity in 2023? YES_____ NO_____
*If YES, please provide statements from the charity
29. 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)
30. 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

31. Did you receive Health Insurance through the Marketplace? YES_____ NO_____
*If YES, please provide 1095-A form
32. Gambling losses to the extent of winnings? YES_____ NO_____
YES_____ NO_____
33. Other expenses you feel may be deductible? YES_____ NO_____

34. 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?_____

35. 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**

36. 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 **(1099-SA)**

37. Did you (or your spouse) 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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Adam@advantagetaxservice.net

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