

Please answer the following questions to the best of your ability. If you do not know the answer, leave blank if we feel we need more information, we will contact you.

Personal Information:

	Yes	No
Did your filing status change last year? (Single, Married, Head of Household, Widowed)		
If married, do you and your spouse file tax returns separately?		
Can you or your spouse be claimed as a dependent on another return?		
Did you or your spouse ACTIVELY serve in the Military last year?		

Dependents:

	Yes	No
Were there changes in your dependents for last year (list on page one)		
Did you pay Childcare Providers last year?		
Do you have children under 18 with UNEARNED income of \$1,100?		
Do you have any children on your tax return, 18, or full-time students? 19-23, who did not provide more than half of their own cost of living with earned income?		
Did you adopt a child or begin adoption proceedings last year?		
Are any of your dependents non-U.S. citizens or non-U.S. residents?		
Are any of your dependents required to file a tax return?		

Healthcare:

	Yes	No
Did you obtain healthcare through Marketplace (Obamacare)? If yes, you must provide us with your 1095-A.		
Did anyone on your tax return have a Health Savings Account?		

Education:

	Yes	No
Did anyone on your tax return incur any post-secondary education expenses?		
Did any one your tax return pay any student loans?		
Did anyone on your tax return withdrawn money from IRA for education?		
Did anyone on your tax return use an Education Savings Fund? If yes, need 1099-Q		

Deductions and Credits:

	Yes	No
Did you and/or spouse contribute property (other than cash) with a fair market value of more than \$5000 to a charitable organization?		
Did you or your spouse incur any casualty loss or theft loss?		
Was your loss due to a National Declared Disaster?		
Did you purchase an alternative technology vehicle last year?		
Did you use gasoline or special fuels for farm or business use? _____ Gallons _____ Type _____ Purpose		
Did you install any alternative energy equipment in your main residence? Provide Receipts with full description.		
Did you install energy efficiency improvements, like windows, roof, heat pump, etc.?		

Investments:

	Yes	No
Did you or your spouse have any cancelled debts last year?		
Did you or your spouse purchase or become partners in any new business, rental property, or farms last year?		
Did you sell or close any currently one business or farm?		
Did you sell, exchange, or purchase any real estate?		
Did you open or close on a Short Sale?		
Did you sell any securities that are not reported on a 1099-B?		

Retirement or Severance:

	Yes	No
Did you contribute to a Traditional or Roth IRA?		
Did you roll into a Roth IRA any distributions from a retirement plan?		
Did you make a qualified charitable contribution?		
Did you retire or change jobs?		
Did you receive retirement or severance pay?		

Personal Residence:

	Yes	No
Did your personal residence address change? Report on page one.		
Is your mortgage on your first and/or second home more than \$750,000?		
Did you cash in Retirement Funds to purchase a home last year?		
Did you have and outstanding Home Mortgage Loan last year?		
Do you have Mortgage Interest to deduct? Provide 1098.		

Sale of Personal Home:

	Yes	No
Did you sell your home last year? Provide 1099-S		
Did you occupy the Sold Home at least two of the last five years?		
Did you rent the property?		
Did you use any of the property for business purposes?		

Gifts:

	Yes	No
Did you give any one person a gift of more than \$17,000 cash?		
Did you gift stock, vehicles, or other such asset to anyone last year?		
Did you forgive an indebtedness to an individual or trust?		

Foreign Matters:

	Yes	No
Did you work outside of the United States for Foreign Currency?		
Did you transfer any money to/from a foreign account?		
Did you have any foreign transactions of any kind last year?		

Miscellaneous Questions:

	Yes	No
Did you pay any household employees more than \$1,000 in a quarter or \$2,200 for the entire year?		
Did you or spouse receive unreported tip income or \$20 more in any month?		
Did you or your spouse engage in any bartering transactions?		
Did you receive any notice from IRS regarding a prior year tax return?		
Did you buy, sell, or exchange any cryptocurrency in 2023?		