

## MISCELLANEOUS QUESTIONS

Please carefully answer these questions and be sure to provide  
all requested documentation for tax filing accuracy.

2023

Yes No

### ***Tax Return Delivery:***

Select how to receive your completed tax return:

**Paper return**

☐

**Electronic return - signing electronically with AdobeSign and receiving a PDF copy of return**

☐

**If electronic, provide:** Taxpayer email: \_\_\_\_\_

Spouse email: \_\_\_\_\_

### ***Personal Information:***

\* Are you a citizen of the United States of America?

☐ ☐

\* Is your spouse (if applicable) a citizen of the United States of America?

☐ ☐

\* Did your address, phone or email change during the year?

☐ ☐

**If yes, provide:** \_\_\_\_\_

\* Did you renew your drivers license in the last 12 months? **If yes, provide an updated copy (front & back)**

☐ ☐

\* Did your marital status change during the year?

☐ ☐

**If yes, explain:** \_\_\_\_\_

\* Did you live separately from your spouse during the last six months of the year?

☐ ☐

\* Do you have a separate decree, instrument, or agreement and are not living in the same household by the end of the year?

☐ ☐

\* Can you be claimed as a dependent by another taxpayer?

☐ ☐

\* Did you or any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have you received a letter from the IRS notifying you of identity theft? **If yes, attach the IRS letter.**

☐ ☐

\* Do you want to designate \$3 to the Presidential Election Campaign Fund?

☐ ☐

\* Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

☐ ☐

### ***Dependent Information:***

\* Are there any changes in dependents you are claiming from the last year?

☐ ☐

**If yes, explain:** \_\_\_\_\_

\* Did you have any children under age 19 or full-time students under age 24 at the end of 2023, with total investment income in excess of \$2,500? **If yes, please provide their information.**

☐ ☐

\* Do you have dependents you are claiming who must file a tax return?

☐ ☐

**If yes, whom?** \_\_\_\_\_

\* Did you provide over half the support for any other person(s) other than your dependent children during the year? **If yes, whom?** \_\_\_\_\_

☐ ☐

\* Did you pay for child care while you worked, looked for work, or while a full-time student?

☐ ☐

**If yes, attach child care provider information.**

\* Did you pay any expenses related to the adoption of a child during the year? **If yes, provide documents.**

☐ ☐

\* If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? **If yes, attach agreement.**

☐ ☐

# MISCELLANEOUS QUESTIONS

2023

Yes No

## Retirement Information:

- \* Did you retire or change jobs this year? **If yes**, what date? \_\_\_\_\_ ☐ ☐
- \* Did you contribute to a pension or retirement plan during the year? ☐ ☐
- \* Did you receive any Social Security benefits during the year? **If yes**, attach documents. ☐ ☐
- \* Did you make any withdrawals or lump sum distributions from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? **If yes**, attach documents and answer next question. ☐ ☐
- \* **If yes**, were any withdrawals due to a Federally declared disaster? ☐ ☐
- \* Did you make any qualified charitable distributions (QCD) from a retirement account during the year? **If yes**, attach documents. ☐ ☐
- \* If you received a qualified disaster retirement plan distribution, did you repay any of the **distribution in 2023**? **If yes**, attach any Form(s) 5498 you received. ☐ ☐
- \* Did you plan on contributing to an IRA for the 2023 tax year before April 15, 2024? ☐ ☐  
**If yes**, how much to Traditional IRA? \_\_\_\_\_ How much to Roth IRA? \_\_\_\_\_
- \* **If you would like us to calculate the maximum amount to be contributed and contact you, please check here** \_\_\_\_\_. Traditional IRA ☐ or Roth IRA ☐

## Income Information:

- \* Did you receive any income from property sold with an installment sale prior to this year? **If yes**, provide the amount received. ☐ ☐
- \* Did you receive any unemployment benefits during the year? **If yes**, attach document. ☐ ☐
- \* Did you receive any disability income during the year? **If yes**, attach document. ☐ ☐
- \* Did you receive any Medicaid waiver payments as difficulty of care during the year? ☐ ☐
- \* Did you receive tip income not reported to your employer this year? **If yes**, how much? \_\_\_\_\_ ☐ ☐
- \* Did any of your life insurance policies or annuities mature, or did you surrender any policies or annuities? **If yes**, attach 1099-R, 1099-INT or 1099 DIV. ☐ ☐
- \* Did you receive any awards, prizes, hobby income, gambling or lottery winnings? **If yes**, attach form 1099-MISC or 1099-G. ☐ ☐
- \* Did you receive any income considered to be nonemployee compensation? **If yes**, attach form 1099-NEC, 1099-K or 1099-MISC ☐ ☐
- \* Did you receive or pay any alimony or maintenance? ☐ ☐

Received Amount \$ \_\_\_\_\_

Paid Amount \$ \_\_\_\_\_

Date of original divorce or separation agreement \_\_\_\_\_

## MISCELLANEOUS QUESTIONS

2023

Yes No

### ***Purchases, Sales and Debt Information:***

- \* Did you acquire a new or additional interest in a partnership, S corporation, or LLC this year?  
**If yes**, provide documents. ☐ ☐
- \* Did you sell an existing partnership, S corporation, or LLC this year? **If yes**, provide documents. ☐ ☐
- \* Did you engage in any bartering transactions? **If yes**, attach information. ☐ ☐
- \* Did you sell, exchange, or purchase any real estate, rental property or personal residence during the year?  
**If yes**, provide the closing or HUD settlement statement. ☐ ☐
- \* Did you foreclose or abandon a principal residence or real property during the year? **If yes**, provide documents. ☐ ☐
- \* Did you acquire or dispose of any stock during the year? **If yes** to a disposition, attach form 1099-B. ☐ ☐
- \* Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork,  
or used digital assets to pay for goods or or services? **If yes**, provide documents. ☐ ☐
- \* Did you open a home equity loan this year? **If yes**, provide documents. ☐ ☐
- \* Did you refinance a principal residence or second home this year? **If yes**, attach HUD settlement statement. ☐ ☐
- \* Did you lend money with the understanding of repayment and this year it became totally uncollectable?  
**If yes**, provide details. ☐ ☐
- \* Did you have any debts canceled or forgiven this year, such as a home mortgage, credit cards or  
student loan(s)? **If yes**, attach form 1099-C. ☐ ☐
- \* Did you purchase a new or previously owned Clean vehicle this year that is eligible for the new clean  
vehicle credit? **If yes**, attach the vehicle statement from the dealer. ☐ ☐

### ***Education Information:***

- \* Did you, your spouse, or your dependents attend a post-secondary school during the year?  
**If yes**, whom \_\_\_\_\_ ☐ ☐
- \* Did you have any educational expenses during the year on behalf of yourself, your spouse,  
or a dependent? **If yes**, attach any Form(s) 1098-T and receipts for qualified tuition and related expenses. ☐ ☐
- \* Did anyone in your family receive a scholarship of any kind during the year?  
**If yes**, whom? \_\_\_\_\_ Amount? \_\_\_\_\_ ☐ ☐
- \* **If yes**, were any of the scholarship funds used for expenses other than tuition, such as room and  
board? **If yes**, provide amounts? \_\_\_\_\_ ☐ ☐
- \* Did you make any withdrawals from an education savings or 529 Plan account? **If yes**, provide 1099-Q. ☐ ☐
- \* **If yes**, were any of the withdrawals rolled over into ABLE (Achieving a Better Life Experience) account? ☐ ☐
- \* Did you make any contributions during 2023 to an education savings or 529 Plan account?  
**If yes**, attach documentation. ☐ ☐
- \* Did you pay any student loan interest this year? **If yes**, attach 1098-E. ☐ ☐
- \* Did you cash any Series EE or I U.S. Savings bonds issued after 1989?  
**If yes**, provide amount used for education expenses \_\_\_\_\_ ☐ ☐

# MISCELLANEOUS QUESTIONS

2023

Yes No

## Health Care Information:

- \* Did you have health care coverage, such as employer-sponsored coverage or government sponsored coverage (i.e. Medicare/Medicaid) for your family? ☐ Yes ☐ No
- \* Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? ☐ Yes ☐ No  
If yes, attach any Form(s) 1095-A you received.
- \* Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family? ☐ Yes ☐ No
- \* Did you make any contributions to a Health savings account (HSA) or Archer MSA? If yes, provide documents. ☐ Yes ☐ No
- \* Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year? If yes, attach form 1099-SA. ☐ Yes ☐ No
- \* Was the total distribution from the HSA used for medical expenses? ☐ Yes ☐ No
- \* Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 5498-QA you received. ☐ Yes ☐ No
- \* Did you receive any distributions from an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 1099-QA you received. ☐ Yes ☐ No

## Deduction & Adjustment Information of Items for which you have receipts:

- \* Did you incur a casualty or theft loss or any condemnation awards during the year? ☐ Yes ☐ No  
If yes, attach documentation.
- \* If yes, did the loss occur in a Federally declared disaster area? The Federally declared disaster areas include storm victims of hurricanes, tropical storms, floods, as well as wildfires. ☐ Yes ☐ No
- \* Did you pay out-of-pocket medical expenses? If yes, provide amounts below: ☐ Yes ☐ No  
Doctors & Hospitals \_\_\_\_\_  
Prescription Drugs \_\_\_\_\_ Insurance Premiums \_\_\_\_\_  
Long-term Care Premiums \_\_\_\_\_ Medical Miles Driven \_\_\_\_\_
- \* Did you make any charitable contributions with cash, checks or credit cards? ☐ Yes ☐ No  
If yes, provide amount: \_\_\_\_\_  
Provide documents for contributions \$250 or greater.
- \* Did you make any charitable contributions of household items, clothing, stocks, etc.? If yes, provide documents from the donee organization to substantiate all contributions made. ☐ Yes ☐ No
- \* Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgement from the donee organization. ☐ Yes ☐ No
- \* Did you pay real estate taxes for your primary home and/or second home? ☐ Yes ☐ No  
If yes, attach real estate tax receipts.
- \* Did you pay any mortgage interest on an existing home loan? ☐ Yes ☐ No  
If yes, attach any Form(s) 1098 you received.
- \* Did you incur interest expenses associated with any investment accounts you held? ☐ Yes ☐ No  
If yes, provide documents.
- \* Did you utilize an area of your home for business purposes? If yes and you plan on taking the in home office deduction, please provide information. ☐ Yes ☐ No

## MISCELLANEOUS QUESTIONS

2023

Yes No

### ***Deduction & Adjustment Information of Items for which you have receipts (Cont'd):***

- \* Did you own a business and use your personally owned car for other than commuting? **If yes**, provide:  
Total miles driven in 2023 \_\_\_\_\_  
Total business miles driven in 2023 \_\_\_\_\_
- \* Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty? **If yes**, attach documentation.
- \* Did you make any major purchases during the year (cars, boats, RV's etc.)? **If yes**, attach documents.
- \* Did you make any out-of-state purchases (by telephone, internet, mail, or in person) or purchases on an Indian Reservation for which the seller did not collect state sales tax?  
**If yes**, provide the amount purchased \$ \_\_\_\_\_
- \* Are you a teacher or school administrator who provided school supplies in your job and were not reimbursed? **If yes**, provide amount paid during 2023 \$ \_\_\_\_\_

### ***Estimated Taxes:***

- \* Do you expect a large fluctuation in income, deductions, or withholding next year?  
**If yes**, please tell us how and why. \_\_\_\_\_
- \* Did you make quarterly estimated payments for 2023?  
**If yes**, please provide copies of canceled checks or proof of payment.
- \* If you will be receiving a refund, do you want excess applied to your 2024 estimated tax (instead of being refunded)?

### ***Refunds/Amount Due:***

- \* If you will be receiving a refund, do you want the refund direct deposited to your bank account instead of a paper check?
- \* If you owe taxes, do you want a direct withdrawal from your bank account instead of writing a paper check?

**Note - Bank Verification Form must be completed, signed and returned to our office.**

### ***Foreign Income & Accounts:***

- \* Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
- \* Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country? **If yes**, please provide the institutions name, account number and highest balance during 2023.
- \* Do you have any foreign financial assets, or hold interest in a foreign entity?
- \* Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer? **If yes**, provide information.

MISCELLANEOUS QUESTIONS

2023

Yes No

**Miscellaneous Information:**

- \* Did you make gifts of more than \$17,000 to any individual during 2023? If yes, provide information. ☐ ☐
- \* Did you engage the services of any household employees and pay them greater than \$2,600 during 2023? If yes, please provide information. ☐ ☐
- \* Did you make any residential energy-efficient improvements to your main home this year? If yes, provide receipts. ☐ ☐
- \* Did you receive correspondence from the State or the IRS? If yes, explain: ☐ ☐  
\_\_\_\_\_
- \* Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due? If yes, years?\_\_\_\_\_ Amounts? \_\_\_\_\_ ☐ ☐
- \* Should we have questions, will you be out of town at any point in time before & including April 15, 2024? ☐ ☐  
If yes, please provide the dates you will be out of town. \_\_\_\_\_

**Thank you!**

Taxpayer Signature

Date

Spouse Signature (if applicable)

Date