

Questionnaire

Name:

SSN:

Questionnaire

Personal Information

Yes No

- Did your marital status change during the year?
If "Yes," explain. _____
- Did your name change during the tax year?
If "Yes," explain. _____
- If your filing status is married, but you are filing separately from your spouse, did you and your spouse live apart for the last six months of 2023?
- Can you or your spouse be claimed as a dependent by someone else?
- Did your address change during the year?
- Were you, your spouse, or any dependents a victim of identity theft?
If "Yes," explain. _____
- Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?
If "Yes," provide Notice CP01A from the IRS.

Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)

Dependent Information

Yes No

- Did you have any changes in dependents during the year?
If "Yes," explain. _____
- Can another person qualify to claim any of your dependents?
- Did you have any child or dependent care expenses during the year?
- Did you have any adoption expenses during the year?
- Did you have any children under age 19 or a full-time student under age 24 with more than \$2,300 of unearned (ie investment) income?

Provide documentation for proof that your dependent lived with you (their name and your address on school/daycare records, medical/insurance records, etc.) This is required for every child, every year.

Health Care Information

Yes No

- Did any member of your household have healthcare coverage through the Marketplace (MNsure, WI ACA)?
If "Yes," provide copies of Form 1095-A.
- Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year? Provide form 1099-SA
- Did you make any contributions to Health Savings Account (HSA)?

Income, Purchases, Sales, and Debt Information

Yes No

- Did you receive any tips not reported to your employer?
- Did you receive any disability income during the year?
- Did you cash in any U.S. savings bonds during the year?
- Did you start a new business or purchase any rental property during the year?
- Did you sell an existing business, rental property, or other property during the year?
- Did you purchase any business assets or convert any assets to business use?
- Did you buy or sell any stocks, bonds, or other investments during the year?
- Did you earn more than \$10 interest during the year?
- Did you sell a principal residence during the year?
- Did you have a principal residence or a piece of real property foreclosed on, or abandoned, during the year?
- Did you refinance your principal home or second home or take out a home equity loan during the year?
- Did you receive any principal or interest during this year from property sold in prior years?
- Did you rent out your home or use it for business?

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- Did you sell, exchange, or purchase any real estate during the year?
- Did you acquire a new or additional interest in a partnership or S corporation?
- Did you have any debts canceled, reduced or forgiven this year?
- Did you purchase a new or previously owned clean vehicle (electric vehicle, plug-in hybrid, fuel-cell vehicle, qualified commercial clean vehicle) during the year?
If "Yes," provide the report the dealer or seller is required to provide to you.
- Did you receive income or incur expenses associated with a fantasy sports league?
If "Yes," provide documentation.
- Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?
If "Yes," attach Form 1099-MISC, Form 1099-NEC, or Form 1099-K.
- Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?
If "Yes," attach Form 1099-K or Form W-2.
- Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?
If "Yes," provide documentation.
- Did you receive income or incur expenses associated with crowdfunding (e.g., GoFundMe, Patreon, or Indiegogo)?
If "Yes," attach Form 1099-K.
- Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb, VRBO or HomeAway)?
If "Yes," provide documentation.
- Did you receive income or incur expenses as an independent contractor (e.g., Shipt, Instacart, DoorDash)?
If "Yes," provide documentation.
- Did you receive any other income you have not provided information for with this organizer?
If "Yes," explain. _____

Itemized Deduction Information

Yes No

- Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
- Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
- Did you receive any state or local income tax refunds from prior years?
- Did you make any major purchases (vehicle, boat, etc.) during the year?
- Did you pay any real estate property taxes or personal taxes during the year?
- Did you pay mortgage interest during the year?
- Did you make cash donations to charity during the year?
- Did you make noncash donations to charity (clothes, furniture, vehicle, etc.) during the year?
- Did you make qualified charitable distributions (QCD) from an IRA?
- Did you have gambling winnings or losses during the year?

Retirement Information

Yes No

- Did you contribute to a 401k, 403b, 457, SIMPLE, SEP or other retirement plan sponsored through an employer?
- Did you contribute to an IRA, Roth, or other retirement plan NOT sponsored by an employer?
- Did you make any withdrawals or receive distributions from a pension, IRA, Roth, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you make any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you receive any Social Security benefits during the year?

Education Information

Yes No

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Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year?

If "Yes," provide form 1098-T AND a financial statement from the school showing payments made.

Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year (Coverdell, 529 college savings plan)?

Did you pay student loan interest for yourself, your spouse, or your dependents during the year?
If "Yes," provide the amount of interest that was refunded.

Did you receive forgiveness on a qualifying federal student loan?

If "Yes," provide the name of the forgiveness program.

Foreign Tax Information

Yes No

Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?

Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?

Did the total value of all your foreign accounts exceed \$10,000 at any time during the year?

Did you have any income from, or pay taxes to, a foreign country?

Did you receive a Schedule K-3 from a partnership or S corporation?

Did you have ownership in a foreign corporation at any time during the year?

Did you own property in a foreign country?

Refund, Withholding, and Estimated Tax Information

Yes No

Did you make any estimated payments (or apply an overpayment) toward your 2023 taxes?

If you have an overpayment (refund) of 2023 taxes, do you want the refund applied to your 2024 estimated taxes?

Do you want to have any refund directly deposited to your bank account?
If "Yes," provide a cancelled check or savings slip.

Do you want to have any balance due directly withdrawn from your bank account?
If "Yes," provide a cancelled check or savings slip.

Do you anticipate your income or withholdings to be different for 2024?

Miscellaneous Information

Yes No

Did you receive the MN rebate check for \$260/person in late 2023?
If "Yes," provide form 1099-MISC from MN Dept of Revenue.

Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset (virtual/crypto currency, NFT)?

Did you pay W2 wages to any household employees (nanny, housekeeper, etc.)?

Did you make gifts to any one person in excess of \$17,000 during the year?

Did you incur moving expenses with the military during the year?

Did you make any energy-efficient improvements to your main or second home during the year?

Are you self-employed or a business owner who paid health insurance premiums during the year?

Do you own interest or shares in or did you dispose of a Qualified Opportunity Fund during the year?

Did you receive any notices from the IRS, MN, WI or other state taxing authority?
If "Yes," explain. _____

May the IRS discuss your tax return with your preparer?

Would you like to receive your tax return in an electronic format through your client portal?

Would you like to receive your tax return in a paper format?

Provide any other information needed to prepare your tax return.