

Please answer all questions

CIRCLE ONE

11. Have you, your spouse or your dependents taken any college or tech school courses in 2023? (You must provide the 1098-T from the educational institution) - _____ Yes or No
12. Have you paid interest on any student loans in 2023? _____ Yes or No
13. Have you bought, sold, or had your Home foreclosed on in 2023? _____ Yes or No
14. Have you had any Cancellation of Debt in 2023?
(Such as credit cards, auto loans, forgiveness of debt, repossession, etc.) _____ Yes or No
15. Have you made any Energy Efficient improvements to your personal residence in 2023?
(Such as Solar, Geothermal, Wood Stove, Window, HVAC, Doors, Gas Hot Water Heater, Insulation, etc.) _____ Yes or No
16. Did you make any OUT OF STATE purchases (by phone, internet websites, mail order, etc.) that the seller DID NOT collect sales or use tax on in 2023? (If so, provide cost of purchases). _____ Yes or No
17. Did you sell Stock, Timber, Real Estate or any Digital assets in 2023?
(If so, please provide sale information, 1099's or HUD statement from the sale) _____ Yes or No
18. Did you receive Social Security benefits in 2023?
(if yes, please provide your 1099-SSA form) _____ Yes or No
19. Did you receive any lottery winnings, jury duty pay or alimony in 2023? _____ Yes or No
20. Do you or your spouse have any Foreign Bank (Non US) Accounts or Income? _____ Yes or No
21. Have you bought a new electric or hybrid car in 2023?
22. At any time during 2023, did you receive (as a reward, award, or payment) or sell, exchange, gift, or dispose of any DIGITAL ASSETS? (If so, please provide documentation.)
(EX: Bitcoin, Dogecoin, Ethereum, or through brokers such as Robinhood, Coinbase, Cash App, PayPal, etc., they should issue you a year end statement) _____ Yes or No
23. For the year 2023 did you have Government Subsidized health insurance for you and your family through the Affordable Care Act also known as Healthcare.gov or Marketplace Insurance? (provide 1095-A) _____ Yes or No
24. Would you like DIRECT DEPOSIT of any refunds?
(If so, please provide your direct deposit routing number and account number information WITH your tax documents.) _____ Yes or No
25. Would you prefer to receive a copy of your completed tax return by Electronic or a paper copy? Electronic or Paper

Please note in the section below any other items you would like to discuss with your tax preparer:

****NOTES:**

Our fees are based on the size, complication and forms on your tax return. These fees cannot be accurately determined until the completion of the return. However, if price is a concern, please ask the preparer for a cost estimate prior to the start of your return. The estimate will be within 10% of the final fee. Once the return is started you will be responsible for the fee.

Please sign and date:

Taxpayer: _____ Date: _____

Spouse: _____ Date: _____