

## 2023 Tax Return Questionnaire

<b>Your Name:</b>		<b>Cell &amp; Email:</b>	
<b>Spouse's Name:</b>		<b>Cell &amp; Email:</b>	
<b>Township:</b>		<b>School District:</b>	

1. If you have an overpayment, do you want to  **receive paper check** or  **direct deposit**?  **apply to next year**?
2. If payment owed, do you want to pay electronically from  **Checking** or  **Savings** account?
3. Would you prefer to pay our tax preparation fee by  **Check** or  **ACH** or  **Credit/Debit card (3.5% convenience fee)**?

**BANK INFO. COMPLETE EVEN IF WE HAVE BANK INFO ON FILE:** (Please write clearly)      OFFICE use only: Verified by \_\_\_\_\_.

Bank Name:		Routing #:		Account #:	
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**For year 2023, please answer Y or N to each question. When "Yes", provide all applicable documentation/forms.**

### Personal Information

Yes <input type="checkbox"/>	No <input type="checkbox"/>	Are you OK with us sending you a secure email of your tax return copies rather than a printed copy?
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Address change during the year? If yes, <b>Date Moved &amp; New Address:</b> If self-employed, provide breakdown of self-employment expenses before and after moving. If a W-2 employee, provide a summary of income earned in each township.
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you get married <input type="checkbox"/> , legally separated <input type="checkbox"/> or divorced <input type="checkbox"/> during the year? If yes, please check which one and provide date: _____. If you paid or received alimony, what was the date of the divorce separation agreement?
Yes <input type="checkbox"/>	No <input type="checkbox"/>	If married, do you prefer to file separately?
Yes <input type="checkbox"/>	No <input type="checkbox"/>	<b>ONLY IF NOT MARRIED</b> , could you be claimed as a dependent on another person's tax return for 2023?
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Were there any changes in dependents? If yes, please specify. _____ <b>Parents be sure your dependent children do NOT claim themselves on their individual return if self-prepared.</b> Your return will be rejected electronically if one of your dependents claimed themselves. We will charge an additional fee to paper file your return because a dependent child claimed themselves. As a safeguard, do not allow them to file until after your return has been e-filed.
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did your children under age 19 or full-time students under age 24 at the end of 2023, have interest/dividend or investment income (NOT wages or self-employment income) in excess of \$2500?

### Income

Yes <input type="checkbox"/>	No <input type="checkbox"/>	Any time in 2023, did you receive, sell, send, exchange, any virtual currency (bitcoin or other)? If "yes" enclose a 2023 sale summary (dates, shares and amounts for purchases and sales).
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you start a business <input type="checkbox"/> , farm <input type="checkbox"/> , purchase a rental property <input type="checkbox"/> , or acquire an interest in a business <input type="checkbox"/> ? <b>If so, please provide all documents applicable to the formation of this business (IRS EIN, PA formation approval letters)</b> Note: Mortgage insurance premiums on rental properties is fully deductible.
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you sell any stocks, bonds, business assets, or investment property during the year? Provide your annual brokerage statement and annual 1099-B. <b>Check that basis was provided for all security sales (call your broker for any missing info). If you have a brokerage account, please contact your advisor and ask if a corrected statement is forth coming. This would avoid having to file an amended return where additional tax preparation fees would be incurred.</b>
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you receive distributions from any retirement type plan? Any retirement rollovers or Roth conversions during 2023? If yes, be sure to include all 2023 Form 1099-R.
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you receive any <input type="checkbox"/> prizes, <input type="checkbox"/> awards, <input type="checkbox"/> jury duty, <input type="checkbox"/> lottery/gambling winnings, <input type="checkbox"/> unemployment, <input type="checkbox"/> disability, <input type="checkbox"/> gifts, or any <input type="checkbox"/> miscellaneous income? <b>Please check all that apply &amp; provide all documents.</b>
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you have any foreign income or pay any foreign taxes?
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you have any debts cancelled, debts forgiven, have any property foreclosed, seized, or taken over during 2023? If so, were your debts greater than your total assets? Yes <input type="checkbox"/> or No <input type="checkbox"/>
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you purchase or sell your principal residence in 2023? If yes, provide us with the "HUD-1" settlement sheet(s). If a 1 <sup>st</sup> time homeowner, did you pull IRA money to buy house? (401k money doesn't qualify).
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did your children receive any savings bonds in 2023? If yes, what interest was accrued/earned in 2023? <a href="#">Click or tap here to enter text.</a> (Memo – US Savings bond election). We can discuss.

**Only if you are over the age 59 ½ AND receiving distributions from your IRA accounts, complete the following:**

1. Combined total value of all traditional IRA accounts for you on 12/31/2023?
2. Combined total value of all traditional IRA accounts for your spouse on 12/31/2023?

**Adjustments to Income**

Yes <input type="checkbox"/>	No <input type="checkbox"/>	Teachers Only (K-12, non-athletic) Did you and/or your teacher spouse have any out-of-pocket expenses for teaching supplies, books, etc.? If so, provide separate details for each person.
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**Itemized Deductions (Note: Investment advisor fees are no longer deductible)**

Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you refinance any mortgage or loan in 2023? If so, provide us with all refinance settlement sheet(s). New primary residence loans are limited to \$750,000 (pre-existing loans are grandfathered to \$1,000,000).
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Do you have a home equity loan or line of credit? If so, were the loan proceeds used 100% to buy, maintain or improve your primary residence?
Yes <input type="checkbox"/>	No <input type="checkbox"/>	<b>Only if you lived in a Federally declared disaster area:</b> Did you have any casualties (fire, flood, theft, damage, etc.) during the year? If so, please document the market value of the property before the casualty, value after the casualty and total insurance reimbursement.

**For Small Businesses and Employees, for State and Local Tax Purposes**

Yes <input type="checkbox"/>	No <input type="checkbox"/>	Were you required to pay for work expenses (cell, home internet, travel, dues, etc)? If so and you did not receive 100% reimbursement, provide details and amounts of expenses & reimbursements. Did you use your car on the job (not commuting to/from work)? The IRS and PA require a log.
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**Credits**

Yes <input type="checkbox"/>	No <input type="checkbox"/>	For your primary residence, did you purchase <b>solar, wind, geothermal or fuel cell energy source</b> ? If so, summarize ALL costs paid in the current year. Note: This includes parts & maintenance on solar/geothermal systems. Include Model Number and Energy Star Certification.
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you, your spouse or dependent have college tuition expenses (after high school) in 2023 (even if the classes were not attended until Jan-March 2023)? If yes, <b>a copy of the 1098-T is required.</b>
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you receive a distribution from an Educational Savings Account or Qualified Tuition Program? If you fully closed out a QTP, did you incur a loss (distributions were less than contributions)?
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you pay child/dependent expenses so you/your spouse could work/look for work during 2023? If so, did you take part in the Section 125 pre-tax dependent care benefit program (W-2 box 10)? New higher income limits for 2023.
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you pay any adoption expenses in 2023? If so, \$
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Home improvement credit: did you add insulation, exterior doors, windows or an energy efficient HVAC system or water heater in 2023? Provide details and applicable costs (don't include installation)
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you purchase an electric vehicle? If so, please provide the 2023 bill of sale.

**Healthcare**

Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you have Obamacare/market-place health insurance in 2023? If "Yes" and you purchased through the marketplace (NOT your employer), <b>you must provide all forms 1095-A for each health insurance plan. If you did not receive one or both 1095-A Forms, call your health insurance provider for them to send you a copy. We cannot prepare your return without this form(s).</b>
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**General**

Yes <input type="checkbox"/>	No <input type="checkbox"/>	Did you have an interest in or signature authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? What was the aggregate value?
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## CHECKLIST

Please submit to us the following applicable 2023 documents. **We would appreciate if you could present these items to us in the following order as it will make the preparation more efficient and timelier:**

- Social security numbers and date of birth for new dependents.
- All Local Earned Income Tax Forms.
- W-2 Forms from all employers & last pay stub - for reference (returns cannot be prepared from pay stubs alone).
- 1099 Income Forms (Interest, Dividend, Retirement, Debt Cancellation, etc.) (including State/Local refund forms).
- 1099-Brokerage Statements reporting security sales & year-end/annual brokerage or investment statements.  
**Make sure cost basis is included. If you have a brokerage account, please contact your advisor, and ask if a corrected statement is forthcoming. This would avoid having to file an amended return where additional tax preparation fees would be incurred.**
- 1095 A (when insurance obtained through the market place/"Obama Care") documenting health care coverage.
- Social Security benefits rec'd year-end statement(s) (**contact SSA 800-772-1213 for a duplicate copy if not rec'd**).
- Unemployment benefit Form 1099-G (**call 888-313-7284**).
- Schedule K-1 Forms, Federal & State(s), for interests in a Partnership, S Corporation, &/or Estate/Trusts.
- Farm income received this past year including from sales of livestock, crops, etc. & a summary of farm expenses.
- W-2-G from Gambling winnings (including losses), all other misc. income.  
Please provide a **separate summary for each rental property** listing the income received and expenses paid for that individual property (we do not need receipts) for 2023. **Please use your Schedule E from prior year as a worksheet to document income and expenses for the current year or call our office and we can provide you with a blank worksheet for the current year. We cannot accept receipts for expenses and our office cannot summarize them for you**
- Settlement sheets for all properties refinanced, purchased, and/or sold during 2023.
- If you refinanced, please contact the lender to confirm if you paid points (amount paid & length of loan needed).
- Mortgage Interest paid form(s) 1098 for primary home loan, home equity and/or rentals.
- 1099-Misc Forms and other related summary for income received but not reported on a 1099-Misc. Also, an expense summary related to this income (we do not need you to provide actual receipts).
- Mortgage Interest paid form 1098 for primary home loan, home equity and/or rentals.
- Invoice for 2023 energy efficiencies for solar, wind and geothermal or fuel cell systems **ONLY**.
- Day care/summer camps for each dependent under age 13: **provider name, address, EIN, or SSN and amount paid**.
- PA Property tax/Rent Rebate. Qualified retirees should provide stamped real estate tax bills. For those only who are a widow/widower aged 50-64 or age 65 or older & you rent or own your house & total income (excluding social security) is under \$35,000, we need a letter from your landlord verifying the total rent paid for the year or the township, county & school tax receipts stamped "paid" by the tax authority to claim the property tax rebate.
- Did you receive any notice (from IRS, State or Local) regarding a prior year tax return? If yes, please provide us with the notice(s).
- NEW CLIENTS ONLY**
- 2022 Tax Returns (federal, state, and local).
- Copy of you and your spouse's (if applicable) driver's license.
- Copy of all Social Security cards and date of birth for each family member (you, spouse and dependents).