



# Individual 2023 Income Tax Questionnaire

Client Name: \_\_\_\_\_

If any of the following items pertain to **you** or **your spouse** in 2023, please check the appropriate box and provide additional information if necessary.

## General Information

If yes, please provide details:

- Yes  No  1. Did your marital or filing status change during the year? \_\_\_\_\_  
\_\_\_\_\_
- Yes  No  2. Did your address change during the year? \_\_\_\_\_  
\_\_\_\_\_
- Yes  No  3. Did you renew or update your driver's license information within the last 12 months?  
Provide copies of updated license(s) if yes or if you are a new client.
- Yes  No  4. Did you have any changes in dependents (i.e. have a new child, have a child who turned  
19 who is not a full-time student, or have a child who turned 24)? Please provide details.  
\_\_\_\_\_  
\_\_\_\_\_
- Yes  No  5. Did you have any children under age 19 or full-time students under age 24 at the end of  
2023, with interest and dividend income in excess of \$2,500? Please provide details.  
\_\_\_\_\_  
\_\_\_\_\_
- Yes  No  6. Did your bank account change within the last 12 months? If yes or you are a new client,  
provide a voided check or routing and account number. \_\_\_\_\_  
\_\_\_\_\_
- Yes  No  7. Did you, your spouse, or your dependent receive an Identity Protection PIN (IP PIN) from  
the IRS? \_\_\_\_\_

## Income Information

If yes, please provide details and/or copies of the applicable forms.

- Yes  No  1. Did you receive wages? (Forms W-2) \_\_\_\_\_
- Yes  No  2. Did you receive interest or dividend income? (Forms 1099-INT or 1099-DIV)  
\_\_\_\_\_
- Yes  No  3. Did you roll over retirement funds or receive a retirement distribution? (Forms 1099-R)  
\_\_\_\_\_



# Individual 2023 Income Tax Questionnaire

## Income Information (continued)

- Yes  No  4. Did you receive social security benefits? (Forms SSA-1099) \_\_\_\_\_
- Yes  No  5. Did you receive unemployment benefits? (Forms 1099-G) \_\_\_\_\_
- Yes  No  6. Did you sell stocks, bonds, or other investment property (i.e. Charles Schwab, Vanguard, etc.)? (Forms 1099-B) \_\_\_\_\_
- Yes  No  7. Did you sell virtual currency? (Forms 1099-B) \_\_\_\_\_
- Yes  No  8. Did you buy or sell real estate? (Closing disclosure, formerly known as the HUD-1, and/or Forms 1099-S) \_\_\_\_\_
- Yes  No  9. Did you have any debts cancelled or forgiven? (Forms 1099-C) \_\_\_\_\_
- Yes  No  10. Did you receive a distribution from or contribute to a Health Savings Account (HSA)? (Forms 1099-SA) \_\_\_\_\_
- Yes  No  11. Did you receive any disability income? Please provide details. \_\_\_\_\_  
\_\_\_\_\_
- Yes  No  12. Did you have any foreign income, pay any foreign taxes, or own a foreign bank account? Please provide details. \_\_\_\_\_  
\_\_\_\_\_

## Business/Rental/Farm Information

If yes, please provide details and/or copies of the applicable forms.

- Yes  No  1. Did you have, start, or acquire interest in a Partnership, LLC, S-Corporation, or Trust? (Schedule K-1) \_\_\_\_\_
- Yes  No  2. Did you start a new business? \_\_\_\_\_
- Yes  No  3. Did you receive a 1099-NEC for consulting or contracting work? \_\_\_\_\_
- Yes  No  4. Do you have or did you purchase a rental property and/or royalty income? (Form 1099-Misc). If yes, please provide details. \_\_\_\_\_
- Yes  No  5. Do you have or did you start a farm? \_\_\_\_\_
- Yes  No  6. For business owners: was an area of your home used regularly and exclusively for business? \_\_\_\_\_



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## Deduction Information

If yes, please provide details and/or copies of the applicable forms.

- Yes  No  1. Did you pay college education tuition and fees for yourself and/or a dependent? (Forms 1098-T) \_\_\_\_\_
- Yes  No  2. Did you pay student loan interest? (Forms 1098-E) \_\_\_\_\_
- Yes  No  3. Did you pay for health insurance other than through an employer account? If marketplace, provide Form 1095-A.
- Yes  No  4. Did you make a contribution to a retirement account other than through an employer? Like IRA, SEP, ROTH, or Solo 401K? Please provide details. \_\_\_\_\_
- Yes  No  5. Did you incur **major** medical, vision, dental, or prescription drug costs? (Must exceed 7.5% of your income; i.e. \$100K x 7.5% = \$7,500.) If yes, summarize expenses (can include things like fertility treatment, surgeries, etc.): \_\_\_\_\_
- Yes  No  6. Did you pay real estate taxes? (County tax bills) \_\_\_\_\_
- Yes  No  7. Did you pay registration taxes for your car tag? (Car tag receipts) \_\_\_\_\_
- Yes  No  8. Did you pay interest on a home mortgage or home equity line of credit? (Forms 1098 and details of what the funds were used for. If home equity, HELOC.) \_\_\_\_\_
- Yes  No  9. Did you refinance a mortgage? (Closing disclosure, formerly known as the HUD-1, and term of the loan) \_\_\_\_\_
- Yes  No  10. Did you donate to a charitable organization? (Copies of any giving statements that you received from the non-profit organizations) \_\_\_\_\_
- Yes  No  11. Did you make any charitable contributions? (If the total amount donated is greater than \$500, provide the date for each contribution and the fair market value (thrift shop value) for the contributed items, along with copies of the thrift store receipts.) \_\_\_\_\_
- Yes  No  12. Did you pay child and dependent care costs? (Copy of the year-end statement from the provider including the name, address, and SSN or the EIN of the provider) \_\_\_\_\_
- Yes  No  13. Did you make solar, wind, geothermal or fuel cell energy efficiency improvements (windows, doors, etc.) to your primary residence, install an Electric Vehicle (EV) charging station, or make an EV purchase? (Copies of the receipt and description) \_\_\_\_\_



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## Estimated Taxes

If yes, please provide details.

- Yes  No  1. Did you make any Federal 2023 estimated tax payments? (**Provide amounts and dates paid.**) \_\_\_\_\_
- Yes  No  2. Did you make any State 2023 estimated tax payments? (**Provide amounts and dates paid.**) \_\_\_\_\_
- Yes  No  3. If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 tax (instead of being refunded)? \_\_\_\_\_

## Minnesota Filers

If yes, please provide details.

- Yes  No  1. Did you contribute to a 529 college savings education account? \_\_\_\_\_
- Yes  No  2. Did you have K–12 education expenses (like private school tuition, after-school educational enrichment program, tutoring, and/or summer program, etc.) for your dependents? **If so, how much in total?** \_\_\_\_\_
- Yes  No  3. Did you have long-term care premium coverage? \_\_\_\_\_
- Yes  No  4. Would you like to donate to the non-game Wildlife Fund?
- Yes  No  5. Did you get the 2021 Minnesota Rebate paid out in 2023? (Note: You will receive a Form 1099-MISC if you did.)

## Finalizing Your Tax Return

1. In what format would you prefer to receive your completed tax return?
- Electronic copy (provided through secure client portal)
- Physical copy
- Both
2. If you owe additional tax, how would you like to make the payment?
- Direct debit
- Mail a check



# Individual 2023 Income Tax Questionnaire

## Finalizing Your Tax Return (continued)

3. If you have a refund, how would you like to receive it?
- Direct deposit
  - Receive a check
4. How would you like to sign your completed return?
- Physical signature
  - Electronic signature
5. How would you like to pay for your completed return?
- Cash
  - Check
  - ACH
  - Credit card
6. How would you like to receive your final tax results?
- Email
  - Phone call
  - Zoom meeting