



Documentation Questions

The documentation questionnaire is needed **before** we are able to start your tax return. Please check the appropriate box and include all necessary details and documentation.

Personal Information

Yes

No

- | | | |
|--|-----------------------------|--------------------------|
| 1. Did your marital status change during the year? If yes, explain: _____ | 1. <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Did your home address change from last year? | 2. <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Can you be claimed as a dependent by another taxpayer? | 3. <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Did you change any bank accounts that have been used to direct deposit (direct debit) funds from (or to) the IRS or other taxing authority during the tax year? | 4. <input type="checkbox"/> | <input type="checkbox"/> |

Dependent Information

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|--|-----------------------------|--------------------------|
| 5. Do you have any dependents on this year's return? If yes, please fill out the chart below: | 5. <input type="checkbox"/> | <input type="checkbox"/> |
|--|-----------------------------|--------------------------|

| Name of dependents | Date of birth | Months lived in home | Relationship to taxpayer | College student? | Filed a tax return? | Any Investments |
|--------------------|---------------|----------------------|--------------------------|------------------|---------------------|-----------------|
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| 6. Did you provide over half the support for any other person(s) during the year? If yes, please fill out the chart below: | 6. <input type="checkbox"/> | <input type="checkbox"/> |
|---|-----------------------------|--------------------------|

| Name of dependents living with you | Social Security # | Date of Birth | Relationship to taxpayer | Income |
|------------------------------------|-------------------|---------------|--------------------------|--------|
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| 7. Did you pay for child care while you worked or looked-for work? | 7. <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Did you pay any expenses related to the adoption of a child during the year? | 8. <input type="checkbox"/> | <input type="checkbox"/> |
| 9. 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 not, Form 8332 is required for the noncustodial parent. | 9. <input type="checkbox"/> | <input type="checkbox"/> |

Purchase, Sales, and Debit Information

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|--|------------------------------|--------------------------|
| 10. Did you sell, exchange, or purchase any real estate during the year? | 10. <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Did you purchase or sell a principal residence during the year? | 11. <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Did you foreclose or abandon a principal residence or real property during the year? | 12. <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Did you acquire (buy) or dispose (sale) of any stock during the year? | 13. <input type="checkbox"/> | <input type="checkbox"/> |

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|--|-----|--------------------------|--------------------------|
| 14. Did you take out a home equity loan this year? | 14. | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. Did you refinance a principal residence or second home this year? | 15. | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Did you incur any non-business bad debts this year? | 16. | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Did you have any debts canceled or forgiven this year? (i.e. credit card) | 17. | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. Did you purchase a new plug-in or electric motor energy efficient vehicle this year? | 18. | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. Did you pay any student loan interest this year? (Form 1098-E is required) | 19. | <input type="checkbox"/> | <input type="checkbox"/> |

Income Information

- | | | | |
|---|-----|--------------------------|--------------------------|
| 20. Did you receive any income from property sold prior to this year? (i.e. contract or installment sale) | 20. | <input type="checkbox"/> | <input type="checkbox"/> |
| 21. Did you make any withdrawals out of: ___ IRA ___ SEP ___ Roth ___ 401K ___ Keogh ___ Other qualified retirement plan ___ SIMPLE | 21. | <input type="checkbox"/> | <input type="checkbox"/> |
| 22. Did you make any contributions to a: ___ IRA ___ SEP ___ Roth ___ 401K ___ Keogh ___ Other qualified retirement plan ___ SIMPLE | 22. | <input type="checkbox"/> | <input type="checkbox"/> |
| 23. Did you make any withdrawals from an education savings or 529 Plan account? (Form 1099-Q is required) | 23. | <input type="checkbox"/> | <input type="checkbox"/> |
| 24. Did you make any contributions to an education savings or 529 Plan account? | 24. | <input type="checkbox"/> | <input type="checkbox"/> |
| 25. Did you receive any distributions from: ___ Health Savings Account (HAS) (Form 1099-SA is required) ___ Archer MSA ___ Medicare Advantage MSA | 25. | <input type="checkbox"/> | <input type="checkbox"/> |
| 26. Did you make any contributions to a Health Savings Account (HAS) or Archer MSA (not payroll contributions) | 26. | <input type="checkbox"/> | <input type="checkbox"/> |
| 27. Did you receive any Social Security or Social Security Disability benefits during the year (Form 1099-SSA is required) | 27. | <input type="checkbox"/> | <input type="checkbox"/> |
| 28. Did you receive any unemployment/workshare during the year? (Form 1099-G is required) | 28. | <input type="checkbox"/> | <input type="checkbox"/> |
| 29. Did you receive any disability income during the year? (i.e. third party sick pay) | 29. | <input type="checkbox"/> | <input type="checkbox"/> |
| 30. Did you receive tip income not reported to your employer this year? | 30. | <input type="checkbox"/> | <input type="checkbox"/> |
| 31. Did any of your life insurance policies mature, or did you surrender any policies? | 31. | <input type="checkbox"/> | <input type="checkbox"/> |
| 32. Did you cash any Series EE or I U.S. Savings Bonds issued after 1989? | 32. | <input type="checkbox"/> | <input type="checkbox"/> |
| 33. Are you actively contributing to a pension or retirement plan? | 33. | <input type="checkbox"/> | <input type="checkbox"/> |
| 34. Did you retire or change jobs during the year? | 34. | <input type="checkbox"/> | <input type="checkbox"/> |
| 35. Did you incur moving costs because of a job change? | 35. | <input type="checkbox"/> | <input type="checkbox"/> |

36. Did you invest in Bitcoin, Ethereum, or Lite Coin? 36.

Itemized Deduction Information (if you itemize)

37. Did you incur a casualty or theft loss during the year? 37.

38. Did you pay out-of-pocket medical expenses (co-pays, prescription drugs, etc.) 38.

39. Do you have evidence to substantiate charitable contributions? 39.

40. Did you make any noncash charitable contributions (clothes, furniture, etc.)? 40.

41. Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C. 41.

42. Did you have an expense account or allowance during the year? 42.

43. Did you use your car on the job for other than commuting? (requires mileage log) 43.

44. Did you work out of town for part of the year? 44.

45. Did you have any expenses related to seeking a new job during the year? 45.

46. Did you make any major purchases during the year (cars, boats, etc.)? 46.

47. Did you pay health care premiums/nursing home for your self or your family (Nursing home insurance, etc.)? 47.

48. Did you pay any COBRA health care coverage continuation premiums? 48.

49. Did you pay state and local real estate property taxes this year? If yes, please attach a supporting statement. 49.

Business/self-Employed/Rental

50. Are you a business owner and have paid health insurance premiums for your employees this year? 50.

51. Did you utilize an area of your home for business purposes? 51.

52. Did you engage in any bartering transactions? 52.

53. Did you start a new business during the year? 53.

54. Did you purchase rental property during the year? 54.

55. Did you acquire a new or additional interest in a partnership or S Corporation? 55.

56. Did you sell an existing business, rental, or other property this year? 56.

57. Do you have a vehicle used for your business? (mileage log required) 57.

Foreign Income

58. Were you a grantor or transferor for a foreign trust, have an interest in or signature or other authority over a bank account, securities account, or other financial account in a foreign country? 58.

59. Did you have any foreign income or pay any foreign taxes during the year? 59.

60. Do you have any interest in or signature/authority over a foreign account in a foreign country? 60.
 If yes, please specify country: _____
Form TD F 90-22.1 must be filed if the taxpayer had an account or accounts which had a value or accumulative value at any time during the year exceeding \$10,000. Failure to disclose such an account and file Form TD F 90-22.1 can subject the taxpayer to fines as large as \$500,000.

Miscellaneous Information

61. Did you make gifts of more than \$14,000 to any individual? 61.
 62. Did you pay any college or Votech educational expenses during the year for your, your spouse, or dependents? 62.
 63. Did you participate in cow tipping this year? 63.
 64. Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend on in the coming year? 64.
 65. Did you pay any individual as a household employee during the year? 65.
 66. Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax? 66.
 67. Did you receive correspondence from the State or Internal Revenue Service? 67.
 If yes, explain: _____
 68. Do you want to designate \$3 to the Presidential Election Campaign Fund: 68.
 ____Taxpayer ____Spouse
 69. Is there any other information we need to know that was not included in this questionnaire? 69.
 If yes, explain: _____
IRC 6662(d) assesses an accuracy penalty of 20% when the taxpayer substantially understates their income by the great or 10% or \$5,000. However, in the case of unreported foreign account income the penalty is 40%.
 Can we email/text you notifications?
 Email address: _____
 Cell Phone Provider: _____

Taxpayer Signature: _____

Date: _____

Spouse Signature: _____

Date: _____