

Questionnaire

Name: _____

Questionnaire

Personal Information

Yes No

- Did your marital status change during the 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 2022?
- 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? Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?
If "Yes," explain _____

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 childcare and / or 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 income?

You should have documentation in your personal records to prove eligibility for ALL dependent credits (school records, medical records, daycare records, etc.) Please ask if you have questions about required back-up documentation.

Health Care Information

Yes No

- Did any member of your household have healthcare coverage through the Marketplace (Affordable Care Act / Obamacare)?
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?

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?
IF "YES", provide the cost of EACH asset, the date it was placed in service and the percentage of business use for that asset.
- Did you purchase any gasoline, diesel, or special fuels for off-road business use?
- Did you buy or sell any stocks, bonds, or other investments during the year?
- Did you sell a principal residence during the year? IF YES, provide closing documentation for the purchase and sale of the home.
If "Yes," provide closing documentation for the purchase and sale of the home.
- Did you have a principal residence or a piece of real property foreclosed on during the year?
- Did you abandon a principal residence or a piece of real property during the year?
- Did you refinance your principal home or second home or take out a home equity loan during the year?
If "Yes," provide all escrow, closing, and other pertinent documentation and information.
- Did you receive any principal or interest during this year from property sold in prior years?

Questionnaire

Name: _____

Questionnaire

- Did you rent out your home or use it for business?
- 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 or forgiven this year? Or, did anyone owe you money that became uncollectible?
- Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?
If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service.
- Did you receive income or incur expenses associated with ANY of the following, fantasy sport league, Lyft, Uber, Upwork, TaskRabbit, Poshmark, thredUP, Kickstarter, Indiegogo, Airbnb, HomeAway, Grubhub, Doordash or other similar type of income?
If "Yes," provide Form W-2, Form 1099-MISC, Form 1099-NEC, or Form 1099-K and a summary of expenses.
- REQUIRED!!!! Did you receive any other income you have not provided information for with this organizer? Generally all income is reportable unless it is specifically exempted. Gifts are NOT TAXABLE.**
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 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, etc.) during the year?
- Did you donate a boat or vehicle during the year?
If "Yes," attach Form 1098-C.
- Did you have gambling winnings or losses during the year?

Retirement Information

Yes No

- Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you make any withdrawals (receive distributions from) a pension or profit sharing plan, IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year? Or did you execute a rollover 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

- 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 (even if classes were attended in another year)?
- Did anyone in your household attend a post-secondary school during the year?
- Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
- 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?

Questionnaire

Name: _____

Questionnaire

REQUIRED !!!!! Foreign Tax Information

Yes No

- REQUIRED !!!!!** Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
- REQUIRED !!!!!** Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
- REQUIRED !!!!!** Did the aggregate value of your foreign accounts exceed \$10,000 on any day during the year?
- REQUIRED !!!!!** Did you have any income from, or pay taxes to, a foreign country, or did you own property in a foreign country? Is the income from a mutual funds held in a brokerage account or is it passing through to you on a K-1?

Refund, Withholding, and Estimated Tax Information

Yes No

- If you have an overpayment of 2022 taxes, do you want the refund applied to your 2023 estimated taxes?
- Did you make any estimated payments toward your 2022 taxes?
- Did you apply an overpayment of your 2021 taxes to your 2022 estimated taxes?
- Do you want to have any refund or balance due directly deposited or withdrawn?
If "Yes" and we don't have the information, then please provide a canceled checking or savings slip.
- Do you anticipate your income or withholdings to be different for 2023?

Miscellaneous Information

Yes No

- REQUIRED !!!!!** Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset? This is crypto currency like Bitcoin or Ethereum.
- Did you incur a gain or loss due to damaged or stolen property, while living in a federally declared disaster area?
If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements.
- Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
- Did you make gifts to any one person in excess of \$16,000 during the year?
Yes No
 If "Yes," are you splitting the gift with your spouse?
- Did you make any energy-efficient improvements to your main home during the year?
If "Yes," provide details.
- Did you receive any notices from the IRS or state taxing authority?
If "Yes," explain _____
- May the IRS discuss your tax return with your preparer?
- Would you like a copy of your tax return sent to you electronically instead of receiving a printed copy?

OREGON QUESTIONS

Yes No

- Did you make any political contributions to any candidate or political party voted on in the state of Oregon?
- Did you make a contribution to the Oregon Cultural Trust?
- Did you or your spouse turn 66 by December 31, 2022? If so, you may qualify for the Special Oregon Medical deduction even if you don't itemize. List all medical expenses separately for taxpayer and spouse.