



## REQUIRED TAX QUESTIONS

CLIENT NAME: \_\_\_\_\_

	PLEASE CHECKMARK BOX IN RESPONSE TO THE QUESTIONS ASKED	YES	NO															
1.	Please confirm which account you want a refund electronically deposited into:  BANK NAME: _____ ROUTING NUMBER: _____ ACCOUNT #: _____  Type of Account: CHECKING <input type="checkbox"/> SAVINGS <input type="checkbox"/>																	
2.	Please list dates and amounts of each estimated tax payment: <table border="1" style="width: 100%; margin-top: 10px; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">QUARTER</th> <th style="width: 30%;">DATE</th> <th style="width: 40%;">PAYMENT</th> </tr> </thead> <tbody> <tr> <td>1ST QUARTER</td> <td style="text-align: center;">__/__/__</td> <td style="text-align: center;">\$ ____:____</td> </tr> <tr> <td>2ND QUARTER</td> <td style="text-align: center;">__/__/__</td> <td style="text-align: center;">\$ ____:____</td> </tr> <tr> <td>3RD QUARTER</td> <td style="text-align: center;">__/__/__</td> <td style="text-align: center;">\$ ____:____</td> </tr> <tr> <td>4TH QUARTER</td> <td style="text-align: center;">__/__/__</td> <td style="text-align: center;">\$ ____:____</td> </tr> </tbody> </table>			QUARTER	DATE	PAYMENT	1ST QUARTER	__/__/__	\$ ____:____	2ND QUARTER	__/__/__	\$ ____:____	3RD QUARTER	__/__/__	\$ ____:____	4TH QUARTER	__/__/__	\$ ____:____
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3.	Have you had a change of filing status from last year?																	
	If so, please let us know the date of the status event:  a. Married? _____ b. Divorced? _____ c. Widowed? _____ Deceased Date: _____																	



	PLEASE CHECKMARK BOX IN RESPONSE TO THE QUESTIONS ASKED	YES	NO
4.	Have you had any new children this past year?		
	Please list full name including middle:  a. Child's Name: _____ b. Birth date: _____ c. SSN: _____		
5.	Any childcare expenses? If so, we need documentation of Provider Name, Address, EIN, and amount spent (per child).		
6.	Have you purchased any "real" property this year? If so, we will need purchase documents and closing statements.		
7.	Have you sold any "real" property? If so, we will need the original purchase documents and the selling documents.		
8.	Have you purchased any vehicles or equipment for your business? If so, we will need purchase documents.		
9.	Did you make any contributions to an HSA? If yes, you must be qualified to contribute; <b>NOT</b> on Medi-Share, Medicare, etc. and plan type is correct (Individual vs. Family). If so we need Form 8889.		
10.	Did you make HSA distributions to pay qualified expenses? If so, provide Form 1099-SA.		
11.	Did you have Marketplace Health Care Insurance? If so, we need Form 1095-A.		
12.	Did you have any out of state income? If so, we will need a copy of your driver's license and your spouse's.		
13.	Did you have any foreign accounts?		
14.	Do you have any crypto currency?		
15.	Did you make any contributions to a retirement plan outside of your regular paycheck?		
16.	Did you establish a business retirement plan in 2022?		
17.	Did you make any energy efficiency improvements to your home in 2022 (e.g. windows, doors, insulation, etc.)		
18.	Did you install any renewable energy equipment on/in your home in 2022 (e.g. solar panels, heat pumps, pellet stoves, wind energy)?		
19.	Did you buy an <b>ELECTRIC-ONLY</b> or <b>PLUG-IN</b> hybrid vehicle in 2022?		