

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

**QUESTIONNAIRE- TO BE ANSWERED BY ALL CLIENTS:**

To help assure the accuracy of your tax return and that all possible tax deductions are taken, please complete the following questions.

- Yes No Do you wish to designate a part of your taxes to the Presidential Campaign Fund?
- Yes No Any births, adoptions, marriages, divorces, or deaths in your immediate family during 2023?
- Yes No Did you have any children ***with total investment income*** more than \$2,500, that were under age 19 or full-time students under age 24 at the end of 2023?
- Yes No Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, an S corporation, trust, or REIT, etc?
- Yes No Did you receive income for which you did not receive a Form W-2 or 1099?
- Yes No Did you use your car for business purposes (other than to commute to and from work)? Did you commute between first and second jobs? If yes, complete page 3 of the organizer.
- Yes No Did you move because of a job change? If so, bring moving costs. (May only apply to a State return.)
- Yes No Did you add/install solar energy or any other energy efficient improvements?
- Yes No Did you buy a main home in 2023? If so, please provide the closing statement.
- Yes No Did you sell or gift any stock, real estate, land, or other property or have any become worthless? If yes, complete page 3 of the organizer and provide the final settlement statement for both the purchase and the sale.
- Yes No Did you sell any gold, old jewelry, or precious metals?
- Yes No Did you sell any items on EBay?
- Yes No Did you make a gift to any individual in excess of \$17,000?
- Yes No Does anyone owe you money for which you have exhausted all reasonable efforts to collect?
- Yes No Did you employ any household workers? (Specifically, caregivers, nannies, etc.)
- Yes No Did you pay additional state tax last year because of an audit or filing of a late return?
- Yes No Did you make an internet purchase on which no state sales tax was collected?
- Yes No Did you contribute to a retirement plan, including a Roth IRA? What type of plan? \_\_\_\_\_
- Yes No Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- Yes No Did you make contributions to a Health Savings Account (HSA) this year? (**Do not mark "yes" for FSA**)
- Yes No Did you have any foreign income or pay any foreign taxes?
- Yes No Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account that had a balance of \$10,000 at any point during the year?
- Yes No Did you receive a foreign gift or inheritance from someone in a foreign country or from a foreign entity?
- Yes No Have you ever had the Earned Income Credit denied?
- Yes No Did you claim the Homeowners' Credit in 2008 for which you are responsible for paying back each year?
- Yes No If you bought health insurance through an exchange (i.e. [www.healthcare.gov](http://www.healthcare.gov), [www.coveredca.com](http://www.coveredca.com)), please include in your tax information the Form **1095A** that the Health Insurance Exchange sent you. **Please bring any forms 1095-B or 1095-C received from an insurance company or employer.**

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**OPTIONAL**

- Yes No **Do you want to sign up for the Care Plan** (\$25 per tax return)? If so, please fill out and sign the enclosed IRS Form 8821.

**SIGNATURE REQUIRED:**

To the best of my knowledge, the enclosed information correctly includes all income, deductions, and other information necessary for the preparation for this year's income tax returns and I have adequate records to substantiate data.

Taxpayer \_\_\_\_\_

Date \_\_\_\_\_

Spouse \_\_\_\_\_

Date \_\_\_\_\_