

## TAX RETURN QUESTIONNAIRE - 2023

Client Name:

Spouse:

YES NO

### PERSONAL INFORMATION

- 1a. Are you an existing IFA Taxes client?
- 1b. Does IFA have a copy of your prior year tax return?
- 1c. Will all of your tax documents be available and provided to IFA by April 1st?
- 2a. What is your marital status as of 12/31/2023?
- 2b. Were there any changes to your marital status in 2023?
- 2c. Did you get married in 2023?
- 2d. Did you get divorced in 2023?
3. Were there any changes to your address in 2023?
- 4a. Did you have any dependents in 2023?
- 4b. Do you need IFA to file any tax returns for your dependents?
- 4c. Were there any changes to your dependents in 2023?

### INCOME

5. Did you receive any W-2's for 2023?
6. Did you receive any interest, dividend, or capital gain income from accounts not held with IFA during 2023?
7. Did you or a dependent receive any social security income for 2023?
8. Did you receive a distribution/rollover from a retirement account, pension, or annuity?
9. Did you receive any gambling income for 2023?
10. Did you own any rental properties during 2023?
11. Did you receive any K-1's for any businesses not prepared by IFA for 2023?
- 12a. Were you self-employed (received 1099-NEC income) during 2023?
- 12b. Did you use a portion of your home exclusively for self-employed business purposes during 2023?

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YES NO

**INCOME**

- 12c. Did you use your vehicle for self-employed business purposes during 2023?
- 12d. Did you purchase your own health insurance policy during 2023?
- 12e. Did you/would you like to contribute to a self-employed retirement plan (solo 401k, SEP IRA, Simple IRA, profit-sharing plan, etc.) for 2023?
- 13a. Did you sell a house during 2023?
- 13b. Was the house you sold being used as a rental property?
14. Did you have any other income for 2023?

**DEDUCTIONS**

15. Did you own a home during 2023?
16. Did you make any charitable contributions during 2023?
17. Did you own a car or boat during 2023?
18. Did you pay for any substantial medical expenses out of pocket during 2023?
19. Did you/a dependent pay any student loan interest or education expenses during 2023?
20. Did you/would you like to contribute to a traditional IRA for 2023?
21. Did you/would you like to contribute to a Roth IRA for 2023?
22. Did you/would you like to contribute to an HSA outside of your payroll for 2023?
23. Are there any other deductions you think you might be eligible for that were not mentioned previously?

**CREDITS**

24. Did you purchase an electric vehicle during 2023?
25. Did you have solar panels or an electric vehicle charging station installed during 2023?
26. Did you pay for any childcare for any dependent under 13 during 2023?
27. Are there any other credits you think you might be eligible for that were not previously mentioned?

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**MISCELLANEOUS**

28. Were you or your spouse active duty military during 2023?
29. At any time during 2023 did you own, purchase, or sell any digital assets (cryptocurrencies, NFTs, etc.)?
30. At any time during 2023 did you or your spouse have signature authority over a foreign bank account?
31. Did your state/country of primary residence change during 2023?
32. Did you make any estimated tax payments for 2023?
33. If applicable, would you like any refunds to be directly deposited into a bank account?
34. If applicable, would you like any amounts due with your return automatically withdrawn from a bank account?
35. If applicable, would you like any estimated tax payments automatically withdrawn from a bank account?
36. Did you make any non-charitable gifts over \$17,000 (\$34,000 if married filing joint) to any single individual during 2023?
37. Is there any additional information you'd like to provide that you think would be helpful in preparing your tax returns?

Client Name:

Based on your responses in the questionnaire above, please provide us with the following documents and information:

Client Name:

Based on your responses in the questionnaire above, please provide us with the following documents and information:

Client Name:

Based on your responses in the questionnaire above, please provide us with the following documents and information:

Date

Date