

2023	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes No

- Did your marital status change during the year?
- Did your address change during the year?
- Did your bank account information change within the last twelve months?
- Could you be claimed as a dependent on another person's tax return for 2023?

DEPENDENTS

- Were there any changes in dependents?
- Were any of your dependents between the ages of 19 and 24 enrolled as full-time students for at least 5 months of 2023?
- Did you have any children under age 19 or full-time students under age 24 at the end of 2023, with interest and dividend income in excess of \$1,250, or total investment income in excess of \$2,500?

HEALTH CARE COVERAGE

- Did you and your dependents have healthcare coverage for the full-year?
- Did you and/or your dependents have health care coverage through the Marketplace during 2023? If so, please provide Form 1095-A (Health Insurance Marketplace Statement).

INCOME

- Did you receive any disability income?
- Did you have any foreign income or pay any foreign taxes?

PURCHASES, SALES AND DEBT

- Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- Did you buy or sell any stocks, bonds or other investment property in 2023?

2023	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

Yes No

 Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

 Did you make any residential energy-efficient improvements, purchases involving solar, wind, geothermal or fuel cell energy sources, or purchase a new electric vehicle?

 Did you have any debts canceled or forgiven? If so, provide Form 1099-C.

RETIREMENT PLANS

 Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

 Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

 Did you transfer or rollover any amount from one retirement plan to another retirement plan?

 Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2023?

EDUCATION

 Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

 Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If so, provide Form 1098-T and a list of expenses for books and supplies purchased as required by the school.

ESTIMATED TAXES

 Did you apply an overpayment of 2022 taxes to your 2023 estimated tax (instead of being refunded)?

 If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead of being refunded)?

 Do you expect your 2024 taxable income and withholdings to be different from 2023?

 Did you make estimated tax payments during 2023? Please list the amount of each payment made below:

Amounts & Dates

	<u>Federal</u>	<u>State</u>
1st quarter	_____	_____
2nd quarter	_____	_____
3rd quarter	_____	_____
4th quarter	_____	_____

2023	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

- | Yes | No | MISCELLANEOUS |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to electronically file your tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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? |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used for business? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or the State taxing agency? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to an individual that total more than \$17,000, or any gifts to a trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | At any time during the tax year, did you: receive or sell, exchange, gift, or otherwise dispose of a digital asset (crypto currency, NFTs, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any cash donations to 501(c)(3) charities during 2023? Please provide a breakdown of amounts and charities. |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have Arizona tax due, would you like to offset it with donations to qualified Arizona charities? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you use an HSA to pay for qualified medical expenses in 2023? If so, please provide Form 1099-SA. |