Client Questionnaire- 2023

Personal Information	YES	NO
-Are you married?		
-Did your address change in 2023?		
-Can you be claimed as a dependent by another?		
-Did your bank account change from the prior year? **(2022 on file)**		

Dependent Information	YES	NO
-Did you have a new child in 2023? **(Fill out new Info on Basic Worksheet)**		
-Do you pay for college for yourself or child/children?		
-Do you have any other dependents? **(mother, father, relative, etc.)**		
-Did any of your dependents have income?		
-Did you pay student loan interest for yourself or child? **(Upload 1098-E)**		
-Will you or have you contributed to a Coverdell or 529 Plan?		
-Did you maintain a home for someone else other than a dependent?		
- Did you pay for childcare? **(Fill out info on Basic Worksheet)**		

Purchases, Sales and Debt Information	YES	NO
-Did you start or end a business during the year? Sole Proprietorship?		
-Did you acquire an interest in a LLC, Partnership or C Corp or S Corp? **(Upload K1)**		
-Did you start an LLC or Corporation? **(See page 3)**		
Did you buy or sell any real estate? **(Upload HUD1 or Closing Statement)**		
-Did you sell any stock or mutual funds during the year? **(Upload 1099-B)**		
-Do you buy Cryptocurrency or Bit Coin?		
-Did you use Cryptocurrency to purchase anything?		
-Did you sell Cryptocurrency or Bit Coin? **(Upload 1099-B or pertinent gain/loss info)**		
Did you purchase an Electric or Hybrid clean vehicle? **(Upload Purchase Agreement)**		
-Did you purchase a hybrid or green appliances? **(Upload receipt)**		

Income Information	YES	NO
-Did you receive any wages or W2s? **(Upload W2)**		
-Did you receive 1099s? have self-employment income? **(Upload 1099-MISC or NEC)**		
-Did you receive any interest or dividends? **(Upload 1099-INT or 1099-DIV)**		
-Did you receive any lump sum distributions from a pension or 401K? **(Upload 1099-R)**		
-Did you make a withdrawal or roll-over from a retirement plan? **(Upload 1099-R)**		
-Did you receive any unemployment income? **(Upload 1099-G)**		
-Did you receive or pay alimony? What year is the divorce agreement? ______________		
-Did you have any cancellation of debt? (credit card, mortgage, etc.) **(Upload 1099-C)**		
-Do you have rental income? **(Upload Schedule E Worksheet)**		
-Did you receive any awards from lawsuits? **(Upload 1099-MISC)**		
-Did you receive any Social Security Income? **(Upload SSA-1099)**		

Client Questionnaire-2023

Deduction Information	YES	NO
-Did you incur a casualty or theft loss?		
-Do you own a home? **(Upload 1098 Mortgage Interest Statement)**		
-Did you buy a new home? **(Upload HUD1 or Closing Statement)**		
-Do you have a Home Equity Line of Credit? **(Upload 1098 Mortgage Interest Stmt.)**		
-Did you pay for PMI? Private Mortgage Insurance?		
-Did you make any cash/non cash charity donations? **(See page 3)**		
-Did you work out of town during the year?		
-Did you or your dependents go to college? **(Upload 1098-T)**		
-Do you have any medical expenses?**(See page 3)**		
-Did you pay for long term care premiums?		
-Do you have a HSA or a MSA? **(circle one) (See page 3)**		
-Self employed, did you pay for private healthcare for you or family? **(See page 3)**		
Credit Information	**YES**	**NO**
-Have you started an adoption process?		
-Do you have Covered CA insurance? **(Upload 1095-A & CA-3895)**		
-Did you or will you start a new retirement plan this year?		
-Did you make any Quarterly Estimated Payments? **see below****		
Misc. Information	**YES**	**NO**
-Are you in the military?		
-Did you make any gifts more than $17,000?		
-Are you covered by a pension plan?		
-Did you make a SEP, Traditional or Roth IRA contribution? **(circle one) (See page 3)**		
-Do you have money in a foreign bank account? **(See page 3)**		
-Do you expect any significant changes in the next year? **(please explain)**		
Upload all correspondence from the IRS and the FTB.		
-Do you want to file electronically?		
Stimulus And Estimated Quarterly Info	**YES**	**NO**
*Did you receive the Middle Class Tax refund or the "Gas Refund?		
*How much was it? **(Upload the 1099-G from CA)**		
	Federal	**CA**
**How much did you pay for Q1 (due 4/18/23)		
**How much did you pay for Q2 (due 6/15/23)		
**How much did you pay for Q3? (due 9/15/23)		
**How much did you pay for Q4? (due 1/16/24)		

Client Questionnaire-2023

Deduction Information

Purchases, Sales and Debt Information		
-	Did **YOU** start an LLC or Corporation? Are you the only shareholder/Partner?	**Yes or No**
-	Entity Name:	
-	Address:	
-	EIN:	

Purchases, Sales and Debt Information		
	Donations under $250. Use separate sheet for more than 3 donations.	
-	Cash Donation	
-	Cash Donation	
-	Cash Donation	
	Any donations over $250 please upload donation letter. (Required)	
	Non Cash Donations	
-	Name of Organization	
-	Address of Organization	
-	Description of Donated Items	
-	Original Purchase Cost	
-	Today's Approx. Thrift Store Value	

Medical/Dental Expenses		
-	Doctor, Dentist, Hospital Fees	
-	Insurance Premiums (do not include if you have a 1095-A, Covered CA)	
-	Medical Aids (Glasses, Contacts, Hearing Aids)	
-	Parking Fees & Tolls	
-	Prescription Medicines & Drugs	
-	Medical Miles Driven	

-	HSA or a MSA (Circle what applies) Single or Family plan?	
-	Contribution Amount	
-	Did you make a SEP, Traditional or Roth IRA contribution **(circle one)**	
-	Contribution Amount and Date	

Further explanations:	
-	How much money do you have in a foreign account? (Upload 12/31/23 Bank Statement)
-	How much did you pay for Health Care Premiums for you and your family?
other-	
other-	
other-	