



2023 Tax Return Questionnaire

Date:

Phone Number:

Name:

Email Address:

Address:

City, State & Zip:

Do you have an appointment? Yes or No If yes list date:

If you **answer YES to any of these questions** on this sheet, please **provide detailed** support in your documents or list on 2nd page.

List Name, DOB & SSN of all dependents being claimed. If nothing has changed from previous year, please write “No Change” ***Any dependents being claimed by the taxpayer must meet the requirements set forth in Publication 929***

Did you **work and reside in Florida** the entire 2023 tax year? YES NO

- If no - List of states worked in during 2023:

Did you have **Marketplace Healthcare**? If **YES**, please provide **Form 1095A** YES NO
Previously Obama Care

Potential itemized deductions:

- | | | |
|---|-----|----|
| • Did you make any energy efficient improvements? (<i>Windows, doors, etc.</i>) | YES | NO |
| • Did you make any large purchases that collected <i>sales tax</i> ? (<i>Vehicles, boats, etc.</i>) | YES | NO |
| • Did you make any <i>charitable contributions</i> ? | YES | NO |
| • Medical expenses above 7.5% of your income – for example, 50k of annual pay | | |
| ○ Would need to be above 3.5k of uninsured expenses incurred | | |
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During 2023, did you have any of the following?

- | | | |
|--|-----|----|
| • Continuing education expenses? (<i>Tuition, books, supplies, etc.</i>) | YES | NO |
| • 1098T forms? (<i>College tuition form</i>) | YES | NO |
| • Childcare expense? If yes provide EIN #, name and address of facility | YES | NO |
| • Retirement contributions outside of employer plans? | YES | NO |
| ○ Traditional IRA, ROTH IRA etc | | |
| • Withdrawals from any retirement accounts? | YES | NO |
| • Did you buy, sell, receive or acquire any virtual currency (i.e. crypto) | YES | NO |

- Did you purchase a qualified plug in electric vehicle? YES NO
 - If so, provide the entire bill of sale, the VIN #, year, make and model and the date placed in service.

If you owned **rental property** in 2023, please complete this section.

- Please attach rental income and expenses for 2023

**** There is a very helpful Rental Worksheet template on our website at www.taxadvantage.org under the resources tab ****

During 2023, if you owned a business or were self-employed, please attach income and expenses.

**** There is a very helpful Business Worksheet template on our website at www.taxadvantage.org under the resources tab ****

Did you make any **1040 estimated payments** for 2023? If **YES**, list dates and amounts \$_____

If you would like **Direct Deposit**, please list

Account number # _____ Routing number # _____

Please make additional notes or questions in the below space that your tax preparer should be aware of.