

# Taxpayer Questionnaire 2023

**MUST BE FILLED OUT EVERY YEAR, WE WILL NOT START YOUR RETURN WITHOUT IT**

Name(s): \_\_\_\_\_

“You” refers to both taxpayer and spouse — note “?” if unsure about a question.

LIFESTYLE & TAXES	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you make estimated payments? Please provide information on the following page.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Will there be any significant changes in income or deductions next year?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you or your spouse receive unemployment? If yes, please provide form 1099G (can be downloaded from State).						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay or receive alimony this year? <i>Paid/Received</i> \$ _____ Date of Divorce _____	<i>Recipient's Name/SS#:</i> _____					
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you have health insurance for you, your spouse, and all dependents for the entire year? MA – provide 1099-HC.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase health insurance through a public exchange? If yes, please provide form 1095-A.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled or forgiven?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were you a citizen of or did you live in a foreign country?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you receive income from a foreign investment, bank account, online gambling, have a signature authority, receive a gift or distribution from a foreign source?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have more than \$10,000 in a foreign bank account?						
<input type="checkbox"/> Yes <input type="checkbox"/> No	If so, did you file for FIN-CEN (Report of Foreign Bank and Financial Accounts)? If so, how much interest was earned \$ _____ If we are filing, please complete the Foreign Bank Account Worksheet.							
<input type="checkbox"/> Yes <input type="checkbox"/> No	At any time during 2023 did you receive an award, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (i.e. crypto, bitcoin)? If so, you must complete the Crypto Questionnaire.							
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you buy items online that you need to pay state sales tax on? If so, what were your total taxable purchases? \$ _____							
CHILDREN & EDUCATION	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were any children born or adopted this year? <i>If so, please provide Name/DOB/SS#/gender:</i>						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were any children attending college?	Circle One : Freshman, Sophomore, Junior, Senior	<table border="1"> <tr> <td>Paid by you: <i>Tuition</i> \$ _____</td> <td><i>Student loan interest</i> \$ _____</td> </tr> <tr> <td>Paid by student: <i>Tuition</i> \$ _____</td> <td><i>Student loan interest</i> \$ _____</td> </tr> </table>	Paid by you: <i>Tuition</i> \$ _____	<i>Student loan interest</i> \$ _____	Paid by student: <i>Tuition</i> \$ _____	<i>Student loan interest</i> \$ _____
	Paid by you: <i>Tuition</i> \$ _____	<i>Student loan interest</i> \$ _____						
	Paid by student: <i>Tuition</i> \$ _____	<i>Student loan interest</i> \$ _____						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Can you provide proof that you paid tuition and associated costs within the taxable year?</b> (Please provide 1098T from school, financial transcript, and student loan interest 1098E)						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay any tuition for you or your spouse's continuing education? Please provide amount paid \$ _____ Additional information:						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay for child or dependent care so you could work or go to school? ( <i>Attach statement from provider with EIN &amp; amount paid</i> )						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have any dependent children who earned more than \$1,250 for the tax year 2023?						
<input type="checkbox"/> Yes <input type="checkbox"/> No	Should any of your 2022 dependents not be claimed in 2023? If so, whom? _____							
	For Planning: Any expected dependent changes for 2024?							
INVESTMENTS	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you or your spouse contribute to a tax year 2023 IRA <b>NOT</b> included from your payroll? (Do not include 401K contributions from you job) <b>Taxpayer:</b> <input type="checkbox"/> Traditional \$ _____ <input type="checkbox"/> Roth \$ _____ <b>Spouse:</b> <input type="checkbox"/> Traditional \$ _____ <input type="checkbox"/> Roth \$ _____						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you roll over any amounts from a retirement account in 2023?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you sell any stock or a rental or an investment property?						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Were you granted, or did you exercise, any employee stock options during 2023?						
DEDUCTIONS	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you make any charitable contributions? Please see organizer page.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you contribute to any 529 plans? What state? _____ Amount? \$ _____						
HOME	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase or sell a main home during the year? If yes, provide closing statement.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you use HELOC or mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home? If yes above, please provide additional details regarding how any home equity funds were used on a separate sheet.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you do any energy efficient renovations/improvements? If so, please provide invoices.						
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase an electric car?						
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay rent? If so, how much? \$ _____/year							

<b>BUSINESS</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Have you started a new business or an interest in a partnership, corporation, LLC, farming activity, or other venture during 2023?
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a new client with a business? If so, please provide all business information.
	<input type="checkbox"/> Yes <input type="checkbox"/> No	If you have a business, did you work from a home office or use your car for business? Please provide additional information (see Car & Truck Expenses section on Business Income & Expenses Worksheet).
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any personal assets to business use?
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you receive 1099K from Venmo, PayPal, Etsy, or other organization. If so, please provide 1099K.
	<input type="checkbox"/> Yes <input type="checkbox"/> No	If you received a 1099K, do you have a business related to the money received?

**RESIDENCY**       Full-year resident    Part-year resident    Non-resident      State(s): \_\_\_\_\_

Current Address:	School District & Township:
	Do you rent or own your home? <input type="checkbox"/> Rent <input type="checkbox"/> Own

Did you move in 2023? **Provide prior address and date of move:**

### Estimated Tax Payments — Tax Year 2023

Installment	Date paid	Federal	Date paid	State
First Qtr (April 2023)		\$ _____		\$ _____
Second Qtr (June 2023)		\$ _____		\$ _____
Third Qtr (September 2023)		\$ _____		\$ _____
Fourth Qtr (January 2024)		\$ _____		\$ _____
Amount applied from 2022 refund?		\$ _____		\$ _____
<b>Total</b>		\$ _____		\$ _____

### State Reporting Requirements

Please list any other state filing requirements that pertain to you. Most states require income earned within their borders to be subject to tax. You may have had withholding for those states. If so, please detail this information for us.

State: _____	Source (i.e. K-1 or W2): _____	Withholding: \$ _____
State: _____	Source (i.e. K-1 or W2): _____	Withholding: \$ _____
State: _____	Source (i.e. K-1 or W2): _____	Withholding: \$ _____
State: _____	Source (i.e. K-1 or W2): _____	Withholding: \$ _____

### Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also obtain banking and credit card information in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

### Tax Return Preparation

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance.

**I represent to M. Greenwald Associates LLP the answers provided are accurate.**

Taxpayer: \_\_\_\_\_ Spouse: \_\_\_\_\_