



M. Greenwald Associates LLP

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Cryptocurrency

(i.e. Bitcoin, NFT, Ethereum, etc.)

1. Do you own any crypto currency? Yes No
2. If you are tracking as an investment, what platform/brokerage house do you hold it in?

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- Any purchased, sold, or transferred crypto or ETF funds that do not receive the standard **1099-B** forms you will need to download your wallets/information to Cointracker or Zenledger to generate forms 8949, Schedule 1, and Schedule D.

- I **must** have either a complete 1099-B or 8949, Schedule 1, and Schedule D to prepare your return.
3. If you have received crypto as payment for goods or services, where do you hold it?

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4. Have you purchased any consumer goods or services with your cryptocurrency? Yes No
 5. Have you mined for any cryptocurrency? Yes No
 6. Did you receive any rewards of cryptocurrency? Yes No
 7. Any sales of Cryptocurrencies? Yes No

Please note tax law related to virtual currency is new/evolving/unclear so any recommended tax treatment will be based on interpretation of the guidance available at the time of consult. There is an inherent risk that future revisions may be needed, resulting in added assessments (i.e. tax/interest/penalties) for which we will not be responsible.

I represent to M. Greenwald Associates LLP that I have read the above and the answers provided are accurate.

Print Name _____ Signature _____ Date _____