

4. General Questions - *if you answer yes to any question, please provide requested details, failure to do so will delay your return

1. Did you make any estimated tax payments? (if yes, please provide documentation via checks, electronic payment statements etc.)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Amount- \$
2. Were there any births, deaths, marriages, divorces, adoptions in your immediate family? (please make sure noted on page 1)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
3. Did you or your spouse have any foreign bank accounts? (if yes, please speak with us regarding reporting requirements)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
4. During 2023, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? (provide detail on sales)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
5. Did you purchase goods that you did not pay sales tax on in the tax calendar year (i.e. online purchases)? If so, how much?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Amount- \$
6. Did you or your spouse buy or sell a house? (if yes, please include closing documents)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
7. Did you or your spouse sell any stocks or bonds in the tax calendar year? (if yes, please provide 1099-B or other documentation)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
8. Did you or your spouse receive payments from a retirement, pension or profit-sharing plan? (if yes, please provide 1099-R or SSA-1099)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
9. Did you or your spouse contribute to a Roth IRA or Traditional IRA? (if yes, please provide plan type and contribution documentation)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
10. Did you purchase health coverage on the exchange? (if yes, please provide form 1095A)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
11. Did you have any child or dependency care expenses? (if yes, please include care provider's name, address, EIN and amount for each child)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
12. Did you incur any tuition or continuing education expenses? (if yes, please provide 1098-T, receipts for books etc.)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
13. If you have ownership in an LLC or corporation, did you file or have someone file your beneficial ownership report? (if you need assistance with this, please contact Jennifer)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>

5. Return Copy and Invoice Preferences

Tax Return Delivery Preference:	Both <input type="checkbox"/> Check Box	Portal Upload <input type="checkbox"/> Check Box	Paper Copy <input type="checkbox"/> Check Box
Invoice Preference: (please note, tax return preparation payment is due prior to electronic filing of return unless other arrangements have been made ahead of time)	Email <input type="checkbox"/> Check Box	Paper <input type="checkbox"/> Check Box	Charge to same account as direct deposit/withdrawal <input type="checkbox"/> Check Box

7. Identification

In order to comply with federal and state filing regulations, we need current drivers license or other identification. Please provide us with a copy of your current identification. Failure to do so could result in a delay or the inability to electronically file your tax return. Thank you for your assistance in complying with these requirements.

Taxpayer ID received Yes No Spouse ID received Yes No

Client Signature _____