

Personal Information:

- Taxpayers' full legal name, date of birth and social security number.
- Taxpayers' cell or home telephone number and email address.
- Dependent(s) full legal name, date of birth, social security number, & months resided with taxpayer.
- Form 8332 executed by custodial parent, if applicable.
- Home address and county of residence as of January 1, 2023.
- Copy of taxpayers' driver's license.

Incomes:

- W-2s for each employer.
- W-2G for gambling winnings and/or a detailed record of losses.
- 1099s for all income reported to the IRS: Dividend income (1099-DIV), Interest income (1099-INT), Miscellaneous income (1099-MISC), Retirement (1099-R), sale of home or real estate (1099-S), Unemployment compensation or State Tax Refund (1099-G).
- Rental income.

Deductions:

- 1098-S Mortgage Interest.
- Real estate taxes on personal residence even if you don't itemize.
- 1098-T Education Expenses: scholarships, itemized receipts of qualified educational expenses.
- Child & Dependent Care Expenses: name, address, Tax ID or Social Security Number of the childcare provider and amount paid per child.
- Business Expenses for self-employed individuals.
- Charitable Contributions: detailed list of donations, contribution date, receipts & value of the donation.
- Did you purchase an electric/hybrid vehicle. Need year, make and model.
- Vehicle excise and sales tax paid (may be deductible if you itemize).
- Medical expenses: insurance premiums, doctor, dentist, eye care, and prescriptions if they are substantial.
- Health Savings Account (HSA) contributions (Form 5498-SA) and distributions (Form 1099-SA).
- Personal rent paid in 2023, include # of months and monthly rent, name & address of Landlord
- Rental (if you own rental real estate) expenses detailed per category.
- Contribution to a 529 College Savings Plan. Withdrawn funds from 529 Plans, Form 1099-Q needed.
- Student loan interest, Form 1098-E.

Other:

- Bank account and routing numbers for direct deposit of your potential refund.
- Estimated Tax Payments – include amount paid, date you made the payment and for which quarter. If you have a copy of the check or receipt if paid online, include a copy.
****Even if our office provided the estimated payment vouchers to pay, our office needs to know that you paid them as prepared as not all clients pay the vouchers provided.***
- Number of children in private grade school or high school.
- SOLD HOUSE: Settlement statement(s) for the sale of real estate.
- Last year's tax return, if not prepared by us.
- Health insurance through healthcare.gov marketplace we need form 1095-A if you received a reduction in your premium payment.
- Foreign Accounts: Do you have any foreign accounts?
- In 2023, did you receive, sell, send, exchange or acquire any financial interest in any virtual currency?

Please understand that if incorrect information is provided, this could delay your return being processed and/or result in you receiving a tax notice. Any tax notice caused by an error or omission from our team will be handled swiftly and at no cost to the client.

All other responses to notices are outside the scope of our original work and subject to our hourly rates.

QUESTIONS TO ANSWER FOR YOUR PERSONAL TAX RETURN

Please complete this form and include with your tax material.

CLIENT'S NAME	
ADDRESS	
CITY/STATE/ZIP	
PHONE	
EMAIL	

TAX NOTICES: Have you received tax notices that need addressed? Yes No *(need copy)*

NEW DRIVER'S LICENSE: Did you (spouse) renew or update your driver's license? Yes No *(need copy)*

DO YOU HAVE DEPENDENTS? Yes No Are you claiming dependent(s) on your taxes? Yes No

Are your dependent(s) filing their own taxes? Yes No *If yes, do not have them claim themselves if you want to claim on your tax return.* Have your dependents changed from last year? Yes No *If yes, complete below:*

Child's Legal Name	Date of Birth	SSN

DID YOU PAY FOR PRIVATE SCHOOL/HOME SCHOOL IN 2023? Yes No *If yes, # of children: _____*

DID YOU OR A DEPENDENT PAY TUITION/FEES FOR COLLEGE? Yes No *If yes, need Form 1098-T*

You will have to go online to the college and download, it may not be mailed.

DID YOU INVEST IN 529 COLLEGE CHOICE PLAN? Yes No *If yes, need year end form*

DID YOU PULL MONEY FROM 529 COLLEGE CHOICE PLAN? Yes No *If yes, need Form 1099-Q*

DID YOU GO TO HEALTHCARE.GOV TO OBTAIN INSURANCE? Yes No *If yes, need Form 1095-A*

**We do not need Form 1095-B or 1095-C*

DID YOU PAY ESTIMATED TAX PAYMENTS? FEDERAL Yes No **STATE** Yes No

Need copy of check OR amount paid, date check written & quarter payment made in. Write the amounts of estimated payments made below. We do not need the amount you paid on your 2022 tax return or the 4th quarter estimated payment for the 2022 tax return that was due on 1/16/23.

Estimated Payments	Federal		Indiana (specify if other state)		
	Qtr / Due Date	Amount Paid	Date Paid	Amount Paid	Date Paid
1 ST 4/18/2023					
2 ND 6/15/2023					
3 RD 9/15/2023					
4 TH 1/15/2024					

BANK ACCOUNT: SAME AS LAST YEAR Yes No *If no, provide new information below:*

Bank Account #		Routing #	
----------------	--	-----------	--

DID YOU RENT IN 2023? Yes No

Amount paid each month	\$
Name of Landlord	
Address	
City/State/Zip	

DID YOU BUY AN ELECTRIC VEHICLE/HYBRID IN 2023? Yes No *If yes, need copy of purchase agreement*

DO YOU HAVE FOREIGN ACCOUNTS? Yes No

DO YOU HAVE VIRTUAL CURRENCY/DIGITAL ASSETS? Yes No

Did you use it to sell any currency, buy anything, *if yes, need receipts.* Did you receive (as a reward, award or payment) or sell, exchange, gift, or otherwise dispose of a digital asset? Yes No

Signature _____

Date _____