



Tax Year 2022 Questionnaire

Name: _____

Best Phone # _____

Preferred E-mail Address: _____

Please review the following questions.

Please bring in supporting documents.

FAMILY INFORMATION	Circle Yes or No
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- | | | |
|--|-----|----|
| 1. Did your marital status change during the year? | YES | NO |
| 2. Did your address change from last year? | YES | NO |
| 3. Was there a change in dependents from the prior year? | YES | NO |
| 4. Do you have any children under age 19 or full-time student with unearned income in excess of \$2,300? | YES | NO |
| 5. Did you provide over half the support for any other person(s) other than your dependent child(ren) this year? | YES | NO |
| 6. Do you or your spouse want to designate \$3 to go to the presidential Election Campaign Fund? | YES | NO |
| 7. Did you pay for child care while you worked or looked for work? Amount of dependent care paid by your employer? _____ | YES | NO |
| 8. Are you or your spouse blind or disabled? | YES | NO |
| 9. Can anyone claim you as a dependent? | YES | NO |
| 8. Do you want your tax refund direct deposited?
Routing Number _____ Acct Number _____ | YES | NO |
| 11. If you have a refund for 2022 do you want it applied to 2023? | YES | NO |

INCOME INFORMATION	Circle Yes or No
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- | | | |
|--|-----|----|
| 1. Did you receive any income from wages or salary? Provide W-2 | YES | NO |
| 2. Did you receive any income from Self- Employment? Provide 1099-Misc/1099-NEC See page 4 for organizing information | YES | NO |
| 3. Did you receive any income from the sale of real or personal property? | YES | NO |
| 4. Did you make any withdrawals from a retirement plan? Provide 1099-R | YES | NO |
| 5. Did you make any withdrawals from a retirement plan in 2020 and deferred paying taxes due to Covid? | YES | NO |
| 6. Did you receive any interest income? Provide 1099-INT | YES | NO |
| 7. Did you receive dividend income or sale/trade stock? Provide 1099-DIV/1099-B | YES | NO |
| 8. Did you receive any income from a Rental or Farm? Provide 1099-Misc (HUD-1 if new rental) See Page 4 for organizing information | YES | NO |
| 9. Did you receive any income from a trust, estates, partnership or S-Corp? Provide K-1 | YES | NO |

CONTINUE TO NEXT PAGE

INCOME INFORMATION (CONT)

Circle Yes or No

10. Did you receive Social Security benefits during the year? Provide 1099-SSA YES NO
11. Did you receive any Unemployment Benefits? Provide 1099-G YES NO
12. Did you receive any state refund? Provide 1099-G YES NO
13. Did you receive any awards, prizes, hobby income, gambling or lottery winnings, tips, jury duty, online sales, inheritance, barter income or any other income not listed. Provide 1099-MISC or W-2G for gambling winnings including proof of any losses. YES NO
14. Did you have any debts canceled or forgiven this year? Provide 1099-C/1099-A YES NO
15. Did you have any foreign income or any signature authority over a financial account such as: bank account, securities account, brokerage account in a foreign country? AND/OR Hold any foreign financial accounts or assets? YES NO
16. Did you have any Tip income not reported on your W-2? YES NO
17. In 2022, did you receive, sell, exchange, or otherwise dispose of any financial Interest in any virtual currency? AKA: Cryptocurrency/BitCoin (Provide Statement) YES NO
18. Did you receive any income or incur expenses associated with crowdfunding? This would include monies from KickStarter or GoFundMe, ETC YES NO
19. Have you received any other Income not mentioned above? YES NO

MEDICAL INFORMATION

Circle Yes or No

1. Did you pay out-of-pocket medical expenses or premiums YES NO
 Health insurance (excluding Medicare) _____ Prescriptions _____
 Doctors, Dentists, Hospitals, etc _____ Medical Miles Jan 1- Jun 30 _____
 Jul 1 – Dec 31 _____
 Lodging _____ Qualified Long Term Care (you) _____ (spouse) _____
2. Did you make any contributions to or receive distributions from an HSA? YES NO
 Or Idaho Medical Savings account?
3. Did you enroll in the Marketplace for health care coverage? Provide 1095-A YES NO
4. Did you receive insurance from your employer? Provide 1095-B's and 1095-C's YES NO

ADJUSTMENTS AND DEDUCTIONS

Circle Yes or No

1. Did you contribute to an IRA, SIMPLE, SEP, ROTH, or any other retirement plan? YES NO
2. TEACHERS ONLY: Did you have any educator expense? Amount _____ YES NO
3. Did you make any charitable cash contributions? Amount _____ YES NO
 Total paid to any Idaho Schools, etc _____
4. Did you make any non-cash contributions? Total _____ YES NO
 Total to Idaho Youth and Rehab facilities and Educational Entities _____
5. Did you pay any student loan interest? Total _____ YES NO
6. Did you have any educational expenses during the year that you paid on behalf of yourself, your spouse, or your dependent(s)? Provide 1098-T/acct print out YES NO

CONTINUE TO NEXT PAGE

ADJUSTMENTS AND DEDUCTIONS

Circle Yes or No

7. Did you make a contribution to or receive a distribution from an Educational Savings Account or Qualified Tuition Program? Provide 1099Q YES NO
8. Did you incur moving costs as a result of Active Military Duty? YES NO
9. Did you pay or receive alimony? YES NO
10. Did you purchase/refinance/sell a home in 2022? Provide HUD-1 statement YES NO
11. Did you own your own home? Provide 1098 YES NO
 1st Mortgage Interest _____ 2nd Mortgage (HELOC) _____
 Amount of 2nd not used to improve property _____ Property taxes paid? _____
 Irrigation tax _____ Points _____
12. Did you suffer any casualty or theft loss due to a Natural Disaster? YES NO
13. Did you make any energy improvements to your home or purchase an electric vehicle? Provide documentation for the purchase YES NO

MISCELLANEOUS QUESTIONS

Circle Yes or No

1. Do you pay any individual to work in your home on a regular basis? YES NO
2. Did you work or live out of Idaho for any part of the year? YES NO
3. Did you make any purchases without paying sales tax? YES NO
4. Did you receive any correspondence from the IRS or state? YES NO
5. Did you receive an Identity Protection PIN from the IRS? Provide CP01A Letter YES NO
6. Did you defer paying Self-Employment tax in 2020 due to COVID? YES NO
7. Did you give a gift to anyone over \$15,000? YES NO
8. Did you apply your overpayment of your 2021 tax return to 2022? YES NO
9. Did you not receive an Idaho refund due to filing late? YES NO

ESTIMATED TAX PAYMENTS

	Date	Amount	Date	Amount
Federal Tax	Due 4/18/22	_____	Due 9/15/22	_____
	Due 6/15/22	_____	Due 1/17/23	_____

In 2022, did you Make State Estimated Payments? If so, how much? YES NO

CONTINUE TO NEXT PAGE TO ENTER IN SELF-EMPLOYMENT AND RENTAL INCOME/EXPENSE

Privacy Policy

We collect non-public information about you from the following sources:

- Information we receive from you.
- Information about your transactions with us or other (ie financial institutions).

Unless directed by you, we deny access to your personal and account information to anyone other than our staff. Without your permission, we do not disclose any non-public personal information about you to anyone, except when legally required or permitted in connection with fraud investigations and litigation. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal information. Our policy applies to all current and former clients.

SELF-EMPLOYED AND RENTAL WORKSHEETS

Self-Employed Worksheet

Gross Receipts _____

(Provide 1099-Misc and 1099-K's)

Advertising _____

Bank Fees _____

Communication _____

Health Insurance _____

Interest Paid _____

Legal & Prof Fees _____

Liability Insurance _____

Meals at Restaurants _____

Meals not at Restaurants _____

Office Supplies _____

Rent Expense _____

Repairs _____

Supplies _____

Subcontractors _____

Taxes and License _____

Travel _____

Utilities _____

Wages _____

Asset Purchases _____

Other _____

Rental Property

Property Address _____

(Provide 1099-Misc and 1099-K's)

Rental Income _____

Advertising _____

Bank Fees _____

Insurance _____

Legal & Prof Fees _____

Management Fees _____

Mortgage Interest _____

Property Taxes _____

Repairs _____

Supplies _____

Utilities _____

Yard Maintenance _____

Asset Purchases _____

Other _____

Vehicle Expense

Make of Vehicle _____

Total Miles driven in 2022 _____

Bus Miles Jan – Jun 30, 2022 _____

July 1 – Dec 31, 2022 _____

Business Use of Home

Square Foot of Office _____

Total Sq Foot of Home _____

Daycare Hours _____ Rent _____

Insurance _____ Utilities _____

Repairs _____ Maint _____