



# Tax Year 2023 Questionnaire

Name: \_\_\_\_\_

Best Phone # \_\_\_\_\_

Preferred E-mail Address: \_\_\_\_\_

*Please review the following questions.*

*Please bring in supporting documents.*

## FAMILY INFORMATION

Circle Yes or No

- |  |     |    |
|--|-----|----|
| 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. Can another person qualify to claim any of your dependents?   | YES | NO |
| 5. Do you have any children under age 19 or full-time student with unearned income in excess of \$2,500?                                 | YES | NO |
| 6. Did you provide over half the support for any other person(s) other than your dependent child(ren) this year?                         | YES | NO |
| 7. Do you or your spouse want \$3 designated to the presidential Election Campaign Fund?   | YES | NO |
| 8. Did you pay for child care while you worked or looked for work or at school?<br>Amount of dependent care paid by your employer? _____ | YES | NO |
| 9. Are you or your spouse blind or disabled?   | YES | NO |
| 10. Can anyone claim you as a dependent?   | YES | NO |
| 11. Do you want your tax refund direct deposited?<br>Routing Number _____ Acct Number _____  | YES | NO |
| 12. If you have a refund for 2023 do you want it applied to 2024?  | YES | NO |

## INCOME INFORMATION

Circle Yes or No

- |  |     |    |
|--|-----|----|
| 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<br>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 or any disaster?             | 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 tips, 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 2023, 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 \_\_\_\_\_  
 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 2023? Provide HUD-1 statement YES NO
11. Did you own your own home? Provide 1098 YES NO  
 1<sup>st</sup> Mortgage Interest \_\_\_\_\_ 2<sup>nd</sup> Mortgage (HELOC) \_\_\_\_\_  
 Amount of 2<sup>nd</sup> not used to improve property \_\_\_\_\_ Property taxes paid \_\_\_\_\_  
 Irrigation tax \_\_\_\_\_ Points \_\_\_\_\_ Balance of Mortgage \_\_\_\_\_
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 \$17,000? YES NO
8. Did you apply your overpayment of your 2022 tax return to 2023? 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 4/18/23 _____	_____	Due 9/15/23 _____	_____
	Due 6/15/23 _____	_____	Due 1/16/24 _____	_____

In 2023, 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 2023 \_\_\_\_\_

Bus Miles driven \_\_\_\_\_

Commuting Miles \_\_\_\_\_

**Business Use of Home**

Square Foot of Office \_\_\_\_\_

Total Sq Foot of Home \_\_\_\_\_

Daycare Hours \_\_\_\_\_ Rent \_\_\_\_\_

Insurance \_\_\_\_\_ Utilities \_\_\_\_\_

Repairs \_\_\_\_\_ Maint \_\_\_\_\_