

2023

1040

US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes No

- Did your marital status change during the year?
- Did your address change during the year?
- Were there any changes in dependents?
- Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2023?

HEALTH CARE COVERAGE

- Did you and your dependents have health-care coverage for the full year?
- Did you obtain your insurance from Covered CA and receive a Premium Tax Credit? If so, please bring Form 1095-A (Health Insurance Marketplace Statement)

INCOME

- Do you own any Series EE or I government bonds?
- Did you receive unreported tip income of \$20 or more in any month?
- Did you receive any unemployment or Paid Family Leave income?
- Did you pay or receive any alimony? Year of agreement _____
- Did you have any foreign income other than through a US brokerage firm?
- Did you start a business, purchase rental or royalty property or acquire and interest in a partnership, S-Corporation or Trust?
- Was your home rented out (including Airbnb, Homeaway, etc) or used for business (other than as an employee)?
- Did you pay \$600 or more for services for your business to any one person or company? If yes, did you issue 1099s?
- Did you purchase, sell or refinance any property? If so please bring closing escrow statement.
- Did sell any stocks, bonds or other investment property?

2023	1040	US	Miscellaneous Questions
<input type="checkbox"/>	<input type="checkbox"/>		Did you have any debts canceled or forgiven?
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, etc).?
<input type="checkbox"/>	<input type="checkbox"/>		Did you transfer or rollover any amount from one retirement account to another?
EDUCATION			
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?
<input type="checkbox"/>	<input type="checkbox"/>		Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?
DEDUCTIONS			
<input type="checkbox"/>	<input type="checkbox"/>		If you normally itemize your deductions (Schedule A) did you make any charitable contributions for which you have receipts or canceled checks (under \$250)? Be sure receipts state, "no goods or services were received in exchange."
<input type="checkbox"/>	<input type="checkbox"/>		Did you make a charitable contribution directly from you IRA to an organization?
<input type="checkbox"/>	<input type="checkbox"/>		Did you take equity from your home (refi or HELOC) and use it for other than improving your home?
<input type="checkbox"/>	<input type="checkbox"/>		Did you use your car for business (other than to and from work) for which you kept a mileage log? Business miles _____ and total miles _____ put on the vehicle.
<input type="checkbox"/>	<input type="checkbox"/>		Did you or will you make a contribution to your retirement account for 2023 (401(k), IRA,Roth, SEP, SIMPLE, qualified plan, etc.)?
ESTIMATED TAXES			
<input type="checkbox"/>	<input type="checkbox"/>		Did you make any estimated payments for 2023? If so, please list dates and amounts.
<input type="checkbox"/>	<input type="checkbox"/>		If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead of being refunded)?
<input type="checkbox"/>	<input type="checkbox"/>		Do you expect your 2024 taxable income and withholdings to be substantially different from 2023?
MISCELLANEOUS			
<input type="checkbox"/>	<input type="checkbox"/>		Do you want to allocate \$3 to the Presidential Election Campaign Fund?
<input type="checkbox"/>	<input type="checkbox"/>		Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

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<input type="checkbox"/>	<input type="checkbox"/>		Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account including digital currency in a foreign exchange?
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?
<input type="checkbox"/>	<input type="checkbox"/>		Are you aware of any online or out of state purchases you made where sales tax was not collected?
<input type="checkbox"/>	<input type="checkbox"/>		Did you earn, receive, sell, exchange or use to make purchases any virtual currency?
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a 1099K for funds received from/through GoFundMe, Uber, Lyft, Airbnb, Coinbase, Paypal, Venmo or other company ?
<input type="checkbox"/>	<input type="checkbox"/>		Did you install solar panels on your residence or other energy efficient improvements in 2023?
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase an electric or hybrid vehicle that qualifies for the EV credit? If so, please bring the Clean Vehicle Seller Report (Form 15400).
<input type="checkbox"/>	<input type="checkbox"/>		Did you engage the services of any household employees (nanny or in home health-care not through an organization)? Standard housekeeping or gardening services do not apply here.
<input type="checkbox"/>	<input type="checkbox"/>		Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
<input type="checkbox"/>	<input type="checkbox"/>		Did you or your spouse make any gifts to an individual that total more than \$17,000?
<input type="checkbox"/>	<input type="checkbox"/>		Is your bank account information still the same for Direct Deposit of refunds or Direct Debit of your balance due?
<input type="checkbox"/>	<input type="checkbox"/>		Did the IRS issue you an IP PIN? If so please include the notice with the PIN.
<input type="checkbox"/>	<input type="checkbox"/>		Were you notified or audited by either the Internal Revenue Service or your state taxing agency that we have not already discussed?
<input type="checkbox"/>	<input type="checkbox"/>		May the IRS discuss your tax return with your preparer?
Do you prefer a hard copy of your return _____, a digital copy _____ or both _____? Both is a \$15 additional fee at the time of preparation. The fee later in the year is \$30.			
Do you have any questions for me?			