Questionnaire – 2022 Tax Year

Taxpayer Name _____

Marital Status as of December 31, 2022: □ Single □ Married

Spouse's Name _____

Please answer all questions on pages 1 and 2. Initial page 1 and sign on page 2. Your tax preparer will follow up on any questions that will require additional information or clarification from you. The purpose of the questionnaire is to make sure we don't overlook anything that might affect your tax reporting obligations or benefit you by lowering your taxes.

□ Yes □ No. In 2022, were you divorced or did your spouse die?
□ Yes□ No. Were you separated from your spouse, though still married, on December 31, 2022?
□ Yes□ No. Are either you or your spouse legally blind?
□ Yes□ No. Did you pay or receive alimony in 2022 under a divorce or separation agreement made prior to 2019?
□ Yes□ No. Did you have health insurance for you, spouse, and your dependent children for any portion of 2022?
□ Yes□ No. Did you purchase health insurance through a public exchange (healthcare.gov, Obamacare)?
□ Yes□ No. Did you or your spouse start receiving Social Security benefits for the first time in 2022?
□ Yes□ No. Did you pay for domestic services in your home during 2022 (e.g., nanny, nursing care, etc.)?
□ Yes□ No. Were you on active-duty military service and moved during 2022 because of a permanent change of station?
□ Yes□ No. Did you purchase a new all-electric or plug-in hybrid vehicle in 2022?
□ Yes□ No. Were you involved in any of the following in 2022: □ bankruptcy, □ foreclosure, □ repossession, □ debt cancellation (including credit card debt)?
□ Yes□ No. Were either you or your spouse a member of the military in 2022?
□ Yes□ No. Are you a teacher/counselor/principal with out-of-pocket expenses incurred in 2022?
□ Yes□ No. Were any children born to you or adopted by you in 2022?
□ Yes□ No. Do you have parents living with you, or living on their own, for whom you provide over one-half of their support?
□ Yes□ No. Is there any person you can claim as a dependent in 2022 who was not a dependent in 2021?
□ Yes□ No. Are you the noncustodial parent of children you claim as dependents based on a divorce decree?
□ Yes□ No. Did any of your dependent children or any other member of your household attend college or another post-secondary school in 2022?
□ Yes□ No. Do you have children under 24 who earned more than $2300 of investment income in 2022?
□ Yes□ No. Did you pay for child or dependent care so both you or your spouse could work or go to school?
□ Yes□ No. Did you pay on a student loan in 2022?
□ Yes□ No. Did you, or do you plan to, contribute money to an IRA (traditional, Roth or SEP) or HSA for 2022?
□ Yes□ No. Did you withdraw or roll over any amounts from a retirement account in 2022?
□ Yes□ No. Did you sell or transfer stock or sell any other investment property in 2022?
□ Yes□ No. Were you granted, or did you exercise, any employee stock options during 2022?
□ Yes□ No. Did you have any investments become worthless or were you a victim of investment theft in 2022?
□ Yes□ No. Do you have children under age 24 who received unearned income more than $2300 other than investment income, such as scholarships, royalties, unemployment compensation, etc.?
□ Yes□ No. Did you give a gift to anyone in 2022 worth more than $16,000?
□ Yes□ No. Did you receive an inheritance in 2022?
□ Yes□ No. Did you give property to anyone and received payment less than the true value of the property?
□ Yes□ No. Did you or your spouse receive unemployment benefits during 2022?
Initials - Taxpayer: _____ Spouse: _____

□ Yes□ No. Did you elect to defer payment of a portion of your self-employment (Social Security) tax on your 2020 return?
□ Yes□ No. Did you have any uninsured casualty losses on your property as a result of a hurricane, flood, fire or other natural disaster during 2022? If so, was your county declared a federal disaster area? □ Yes□ No
□ Yes□ No. Did you pay interest on a mortgage on your home or other residential or investment property (this includes a boat or RV with living quarters)? *****
□ Yes□ No. Did you pay sales tax on a major purchase in 2022, such as a vehicle, boat, or motor home? *****
□ Yes□ No. Did you make contributions to qualified charities in 2022? *
□ Yes□ No. Did you or your spouse work from a home office in 2022?
□ Yes□ No. Did you or your spouse use a personal car for business or for your employment in 2022? *
□ Yes□ No. Did you receive income in 2022 from an installment agreement (typically from the sale of a business or other property in which payments will be received over a period longer than a year)?
□ Yes□ No. Did you receive income from rental property, or did you put property up for rent in 2022?
□ Yes□ No. Did you own property that you rented out in 2022 for an amount below the fair rental value?
□ Yes□ No. Did you receive income in 2022 from a sharing/gig economy activity? (e.g., Airbnb, Uber, etc.)
□ Yes□ No. Did you receive a gift in 2022 in excess of $100,000 from a nonresident of the U.S.?
□ Yes□ No. Were you involved in any barter transactions during 2022?
□ Yes□ No. Do you own a business, or an interest in a partnership, corporation, LLC or other venture?
□ Yes□ No. Did you have U.S. income in 2022 that is from a source outside of your state of residence?
□ Yes□ No. Did you purchase or sell your main home during 2022?
□ Yes□ No. If you sold a home, did you purchase it in 2008 and claim the First-Time Homebuyer Credit when you purchased it?
□ Yes□ No. Did you refinance a mortgage or take out a home equity loan during 2022?
□ Yes□ No. Did you use funds from a mortgage or equity line of credit for purposes <u>other than</u> to buy, build, or substantially improve your home?
□ Yes□ No. Did you install solar, fuel cell, wind or geothermal improvements or other energy efficiency improvements to your home during 2022?
□ Yes□ No. During 2022, were you an authorized signer on any foreign bank account?
□ Yes□ No. Did you have a financial interest in a foreign bank account, including a retirement account, even though you were not a signer on the account, during 2022? NOTE: *Having a financial interest in an account means that directly or indirectly the funds in the account belong to you, in part or the whole, no matter whose name the account is titled in.*
□ Yes□ No. Do you have investments, properties or other financial holdings outside of the U.S.?
□ Yes□ No. Do you acquire or dispose of an interest in any non-U.S. business ventures during 2022?
□ Yes□ No. Did you have any sources of income from outside of the U.S. during 2022?
□ Yes□ No. Did you move into the U.S. or out of the U.S. during 2022?
□ Yes□ No. Did you live outside of the U.S. during 2022?
□ Yes□ No. Did you have a foreign retirement account or retirement income from outside of the U.S. in 2022?
□ Yes□ No. Are you required to file a tax return in a foreign country or another state for 2022?
□ Yes□ No. At any time during 2022, did you a) receive (as a reward, award, or payment for property services); or b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

NOTE: The standard deduction for 2022 is $25,900 (MFJ) and $12,950 (Single/MFS). In many cases, taxpayers who itemized in previous years may not be able to itemize in 2022.

Please sign below:

Taxpayer: _____ Spouse: _____

Date: _____ Date: _____