

2022 Questions

Purpose: 2022 has been another unique year and as a result there are some questions we need answered before we can prepare your taxes.

Please answer the following questions and return with the signed disclosure documents.

Tax Payer: _____ **Spouse:** _____

Stimulus Payments

1. Do you have a new address for 2022?

Yes No

2. How many dependents will you be claiming?

3. Did you have the 1st and/or 2nd PPP Loan forgiven in 2022?

Yes No

Virtual Currency

1. At any time during 2022 did you receive, purchase, sell, send, exchange, or otherwise acquire any financial interest in virtual currency?

Yes No

Health Insurance

1. Did you have health Insurance in 2022 from:

- Your employer
- Private Insurance (such as Blue Cross/Blue Shield, Select Health, etc.)
- The Marketplace/ Exchange (the government pays for part of your premium)
Please provide form 1095-A
- Medicare/Medicade

2. Did you contribute or take distributions from a Health Savings Account? *If yes, please provide forms 1099-SA (Distribution) and 5498-SA (Contribution)*

Yes No