

2023 Questions

Please answer the following questions and return with the signed disclosure documents. This form must be filled out before we can prepare your 2023 taxes.

Tax Payer: _____ Spouse: _____

1. Do you have a new address for 2023? Yes No

If yes, What is your new address: _____

2. How many depends will you claim on your 2023 Tax Return (children, parents, ect. Spouse is not a dependent)? _____

3. Did you have the 1st and/or 2nd PPP Loan forgiven in 2023? Yes No

4. At any time during 2023 did you receive, purchase, sell, send, exchange, or otherwise acquire any financial interest in virtual currency? Yes No

If Yes, what kind (Bitcoin, Ethereum, Doge Coing, etc)? _____

5. Did you purchase any energy efficient property (Solar, Heat Pump, Vehicle, Windows, Insulation, etc)? Yes No

If yes, what did you purchase? _____

6. Do you or your spouse have an IRS ID Protection PIN? Yes No

If yes, what is it? _____

7. Did you have health Insurance in 2023 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

8. 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

9. For refunds and tax payments, please enter you routing and account number below:

Routing Number: _____ Account Number: _____