



Annual Tax Client Questionnaire

~Taxpayer Information~

Name:
Phone:
Email:
Occupation:
Social Security # (new client):
Date of Birth (new client):
Address:
Referred by:

~Spouse Information~

Name:
Phone:
Email:
Occupation:
Social Security # (new client):
Date of Birth (new client):

If you are a NEW client, we need:

- A copy of your prior year tax return and a depreciation schedule if you have a rental property or a business
- A copy of Taxpayer and Spouse Driver's License & Social Security Cards for EVERYONE on the return

Would you prefer Direct Deposit of your refund? Yes ~ No (circle one) Same DD as last year? Yes ~ No

- If yes, please attach a voided check (not a deposit slip)

~Dependent Information~

Please include: Name, Age, Date of Birth & Social Security # (if new client) and if claimed this year

#1
#2
#3

Please circle any that apply to your dependents:

- o Daycare Costs ~ Please provide: Daycare name, address, EIN or Social Security Number and cost
o Private School ~ Please provide: age of student, name of school and tuition cost is needed
o College Costs ~ Please provide: 1098T and cost of books purchased, not rented, from school only
o W2 Income (if we are preparing a tax return for your dependent, please also complete the Dependent Questionnaire for each dependent)

~Health Insurance Information~

- Did you have Medicare as your health insurance? Yes ~ No (circle one)
- How much did you pay for Supplemental health insurance in additional to Medicare? \$
- How much did you pay for Dental / Vision insurance (not thru your employer)? \$
- How much did you pay for Cobra insurance? \$
- Did you pay for Long Term Care Insurance? Yes ~ No (circle one) If yes, Amount Paid \$
- Did you receive health insurance through the Marketplace? Yes ~ No (circle one)
o If yes, please provide a Form 1095-A from the Marketplace

Signature & Date of Person Completing Questionnaire



## Annual Tax Client Questionnaire (con't)

### ~Income Information~

- **Did you receive Social Security benefits? Yes ~ No (circle one)**
  - o If yes, we need your Form SSA-1099 from the Social Security Administration
- **Did you receive unemployment? Yes ~ No (circle one)**
  - o If yes, please provide your 1099G from that state
- **Did you receive Alimony? Yes ~ No (circle one)**
  - o If the decree is dated PRIOR to January 1, 2019, please provide the amount received and the name and social security number of the payer
- **Do you own a rental property? Yes ~ No (circle one)**
  - o If yes, please provide all income and expenses
    - Go to our website, Forms & print and fill out the Schedule E checklist for each property
- **Do you own business that is NOT a corporation or partnership? Yes ~ No (circle one)**
  - o If yes, please provide all income and expenses
    - Go to our website, Forms & print and fill out the Schedule C checklist for each business

### ~Investment Information~

- **Did you sell any stocks or mutual funds? Yes ~ No (circle one)**
  - o If yes, please provide the 1099B from your investment company
- **Did you take a distribution from a retirement account? Yes ~ No (circle one)**
  - o If yes, please provide the 1099R received from the payer
- **Did you contribute to a Roth IRA? Yes ~ No (circle one)**
  - o If yes, please provide the amount and if it was paid by the taxpayer or spouse
- **Did you contribute to a Traditional IRA? Yes ~ No (circle one)**
  - o If yes, please provide the amount and if it was paid by the taxpayer or spouse
- **Did you make any contributions to an HSA account that was NOT deducted from your paycheck?**
  - o If yes, what was the amount? \$ \_\_\_\_\_ Was it a single or family account? \_\_\_\_\_

### ~Miscellaneous Information~

- **Did you make federal or state quarterly, estimated payments? Yes ~ No (circle one)**
  - o If yes, please provide the date and amount for each payment and whether it was to the IRS or State
- **Did you purchase or sell any virtual currency? Yes ~ No (circle one)**
- **Did you make any internet or out-of-state purchases with zero sales tax paid? Yes ~ No (circle one)**
- **If you paid rent: How much did you pay? \$ \_\_\_\_\_ Was heat included? Yes ~ No (circle one)**
  - o Note: If your gross income was less than \$24,680, you will need to get a WI Rent Certificate filled out by your landlord
    - Go to our website, Forms & print and fill out the 2022 WI Rent Certificate for each landlord
    - Note, if you receive child support and use a Rent Certificate, please provide support rec'd
- **Did you pay Alimony? Yes ~ No (circle one)**
  - o If the decree is dated PRIOR to January 1, 2019, please provide the amount paid and the name and social security number of the recipient
- **Did you contribute to an EdVest or State College Savings Account? Yes ~ No (circle one)**
  - o If yes, please provide name of child, age and amount paid
- **Did you purchase, refinance or sell a home? Yes ~ No (circle one)**
  - o If yes, please provide Settlement Statement for the Purchase AND the Sale
- **Do you own a home? Yes ~ No (circle one)**
  - o Please provide mortgage interest and real estate taxes paid