

2023 Individual Taxpayer Questionnaire

Last Name				Mailing Address							
Taxpayer							Are you new to our firm?				
Are you blind?		Are you totally disabled?		Email			IP PIN				
Occupation			Date of birth		Home/Cell			*Text ok?			
Spouse							Are you new to our firm?				
Are you blind?		Are you totally disabled?		Email			IP PIN				
Occupation			Date of birth		Home/Cell			*Text ok?			
Photo ID & Social Security Cards required for all new clients or clients with expired ID for both Taxpayer and Spouse. Only SS cards for dependents. *Message and data rates may apply. Reply STOP to opt out of messages. Msg frequency varies.											
Dependent Information. If you answer yes to any of the below questions, please fill out the 1st table below.											
Did any child have income above \$1,050 for the year?				If yes, was the income over \$2,300?							
Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for this tax year?											
Names of dependent children with income over \$1,050				<i>Income from working</i>		<i>Social Security Income</i>		<i>Investment Income</i>		<i>Support Worksheet completed</i>	
All Dependents. Attach sheet for additional dependents											
<i>Full Name</i>			<i>Social Security #</i>			<i>Birthdate</i>		<i>If over 18, student?</i>	<i># of months lived with you</i>		<i>IP PIN letter attached</i>
Additional Information.											
Marital status as of 12/31/23:		Single	Married	Separated	Widow(er)	Registered Domestic Partnership (RDP)		Unsure			
Were you divorced or separated during the year?					Did your dependents change during the year?			Unsure			
<i>Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.</i>											
Have you received any notice from the IRS or state revenue department within the past year (that we don't already know of)?											
If you are due a refund, would you like it directly deposited into your bank account? Yes—Direct deposit											
If you have a balance due, would you like it directly debited from your bank account? Yes—Direct debit											
Name of bank							Type:	Checking	Savings		
Routing #				Account #							
Would you like us to use the account info exactly the same as the last tax return we prepared for you?											
State information		Full-Year resident			Part-year resident			Nonresident			
<i>States of residence & dates</i>											
Estimated Payments & Prior Year Refunds applied to 2023 Taxes.											
Estimated Payments	\$ paid Q1	Date paid	\$ paid Q2	Date paid	\$ paid Q3	Date paid	\$ paid Q4	Date paid	2022 Refund rolled to 2023		
Federal											
Oregon											

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Virtual Currency. If yes to the below questions, provide statements, forms 1099-B or other documentation of transactions. All Taxpayers (New and Prior Clients)		
YES	NO	<i>"You" refers to both taxpayer and spouse. (Leave blank if unsure about a question.)</i>
		Did you buy any virtual currency/crypto currency? (such as bitcoin)
		Did you sell any virtual currency/crypto currency?
		Did you use or receive virtual currency for any transactions?
Questions—All Taxpayers (New and Prior Clients) <i>(Provide related statements or other documentation)</i>		
Income		
YES	NO	<i>"You" refers to both taxpayer and spouse. leave blank if unsure about a question.</i>
		Do you have W-2 income?
		Did you receive interest or dividends?
		Did you receive distributions from an IRA, 401k, or other retirement account?
		Did you roll over any amounts from a retirement account?
		Did you receive Social Security or Rail Road Retirement benefits?
		Did you receive unemployment compensation?
		Did you receive alimony payments? Date divorce was final
		Do you have gambling winnings?
		Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?
		Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?
		Do you have rental income and expenses?
		Did you sell or purchase a main home during the year? If yes, provide closing statement(s).
		If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.
		Did you sell or transfer or purchase any rental or investment property? If yes, provide closing statement(s).
		Did you receive income from an installment sale?
		Were you granted, or did you exercise, any employee stock options?
		Did you have other stock sales income? Do you have basis info if it's not included on your Form 1099-B?
Deductions All Taxpayers		
YES	NO	<i>"You" refers to both taxpayer and spouse. (Leave blank if unsure about a question.)</i>
		Did you refinance a mortgage or take a home equity loan? (provide closing statement)
		Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?
		Did you pay interest on a loan for a boat or RV that has living quarters? If yes, provide details.
		Did you pay alimony in 2023? Date divorce was final
		Did you, or will you, contribute any money to an IRA? ROTH TRADITIONAL SEP OTHER
		Did you make energy efficient home improvements?
		Did you buy an electric vehicle?

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Questions—All Taxpayers (Provide related statements or other documentation)

Deductions SELF EMPLOYED TAXPAYERS

YES	NO	If yes to either of the below, please complete the home office and/or auto expense worksheet (available upon request)
		Did you work from a home office (that is exclusively used for your business) and are self employed?
		Did you drive your vehicle for business purposes, keep a mileage log, and are self employed?

Dependent Related Questions

		Were any children born or adopted in 2023?
		Did you put money in or take money out of a 529 college savings plan?
		Did you pay for child care?

General Questions

		Do you want to electronically file your tax return(s) if possible?
		Do you want to designate \$3 of tax funds to the Presidential Election Campaign Fund?
		Were you a citizen of or lived in a foreign country in 2023?
		Do you own or have financial interest in a foreign bank or other financial account?
		Are you Military Member? If yes, are you on Active Duty or in the Reserves? YES NO
		Are you or your spouse (if filing jointly) a dependent of another person?
		Did you receive federal retirement income from civil service? (If yes, provide dates employed and retirement date)
		Did you make any political contributions?
		Did you purchase an electric vehicle?

Itemized Deductions: Taxpayers who itemize deductions for federal and/or state

Deductions must exceed \$13,850 Single, \$27,700 Joint, \$20,800 Head of Household, or \$13,850 Married Filing Separate to be a federal tax benefit.
Deductions must exceed \$2,420 Single, \$4,840 Joint, \$3,895 Head of Household, or \$2,420 Married Filing Separate to be an Oregon tax benefit.

Charitable Contributions. If over \$500 in noncash donations, provide details/receipts showing a summary of what you gave, the value of your donation and the total (apx) cost of the items when you obtained them. Rules require that the taxpayer retain documentation for all contributions.

Money given	\$
Noncash contributions (FMV). Clothing or household items must be in good used condition or better.	\$
Did you transfer funds from an IRA directly to a charity? Yes No	\$
# of volunteer/charitable miles driven (log needed)	
Did you donate a vehicle? (if yes provide details)	Attach documentation

Medical Expenses. Must exceed 10% of income to be a benefit, unless you are 63 or older. Include cost for dependents. **Do NOT include costs that were reimbursed or paid by insurance, FSA or HSA**

Dentists		Hospitals	\$
Doctors		Insurance Premiums	\$
Equipment		Prescriptions	\$
Eyeglasses		Other	
Hearing Aids/		Medical Miles	

Taxes and Interest Paid. Report property taxes and mortgage interest not on form 1098 below (otherwise attach form 1098)

Address	Taxes Paid \$	Interest Paid \$
Address	Taxes Paid \$	Interest Paid \$
Address	Taxes Paid \$	Interest Paid \$

Ask about supplemental forms for:

- Rental income/expenses
- Small business income/expenses
- Home Office worksheet
- Auto Expense worksheet