

2022**1040****US****Miscellaneous Questions**

If any of the following items pertain to you or your spouse for 2022, please check the appropriate box and provide additional information if necessary.

Yes

No

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Did your marital status change during the year?

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Did your address change during the year? If yes, please provide your current address

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Were there any changes in dependents?

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Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement), if so, please attach.

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Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a business?

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Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

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Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If yes, please provide the closing statement.

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Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

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Did you purchase an energy-efficient or other new or used vehicle? If yes, please provide the purchase invoice.

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Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

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Did you transfer or rollover any amount from one retirement plan to another retirement plan?

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Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2022?

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Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

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Did you incur expenses as an elementary or secondary educator? If yes, what was the amount?

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Do you want to allocate \$3 to the Presidential Election Campaign Fund?

2022

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Miscellaneous Questions

Yes
☐No
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Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

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May the IRS discuss your tax return with your preparer?

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Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

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Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?

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Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

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Did you or your spouse make any gifts to an individual that total more than \$16,000, or any gifts to a trust?

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At any time during the tax year, did you: receive or sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

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Is there any other pertinent information we will need to prepare your tax return?

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If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated tax (instead of being refunded)?

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Do you want to **direct debit tax owed to IRS**, if applicable? If yes, please provide your bank name, routing number and account number.

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Do you want to **direct deposit any tax refund**, if applicable? If yes, please provide your bank name, routing number and account number.

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Do you want to **establish automatic direct debits of your 2023 Estimated Tax Payments**, if applicable? If yes, please provide your bank name, routing number and account number.

Bank Name _____

Routing No. _____ Acct No. _____

Please provide the name, phone number and/or email address (preferred) for tax questions and/or updates on the status of your tax return. **Choose your preferred method of contact by circling your phone number or email address.**

Name _____ Phone No. _____

Text? Yes _____ No _____ Email _____

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Would you like a PDF copy of your tax return in addition to a paper copy?

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Would you like to receive emails from our office with tax updates and office news? Follow us on **Facebook** or **Twitter** for local events, up-to-date tax law changes, and other various information.