

<b>2023</b>	<b>1040</b>	<b>US</b>	<b>Miscellaneous Questions</b>
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If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary.

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? If yes, please provide your current address<br>_____  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive IRS Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes??   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?            |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property in 2023?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 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. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?                     |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase an energy-efficient or other new or used vehicle? If yes, please provide the purchase invoice.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your SEP or IRA's to a Roth IRA in 2023?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur expenses as an elementary or secondary educator? If yes, what was the amount?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to allocate \$3 to the Presidential Election Campaign Fund?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?  |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer?  |

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Yes      No

      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?

      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?

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

      Did you or your spouse make any gifts to an individual that total more than \$17,000, or any gifts to a trust?

      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)?

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

      If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead of being refunded)?

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

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

      Do you want to **establish automatic direct debits of your 2024 Estimated Tax Payments**, if applicable? If yes, please provide your bank name, routing number and account number.

List 2023 Estimated Tax Payment Amounts and Dates \_\_\_\_\_  
\_\_\_\_\_

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 \_\_\_\_\_

      Would you like to receive emails from our office with estimated payment reminders and tax updates?

Follow us on **Facebook** or **Twitter** for local events, up-to-date tax law changes, and other various information.