

2023	1040	US	Miscellaneous Questions
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Please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes No

- Do you want a PDF copy of your return emailed to you instead of a paper copy?
- Did your marital status change during the year?
- Did your address change during the year? If YES, provide new address.

DEPENDENTS

- Were there any changes in dependents?
- Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2023?
- Were the 19 to 23 year old dependents full-time students?
- Did you have any children under age 19 or full-time students under age 24 at the end of 2023 with interest, dividends, capital gains, and other investment income in excess of \$1,250, or total investment income in excess of \$2,500?
- Did you pay child care cost for a dependent child under age 13 or for a handicapped individual so you could work?
- Have you released the child tax credit to any other person?
- Did any of your dependents live with you for less than SIX months?

HEALTH CARE COVERAGE

- Did you and all your dependents have health insurance for the entire year
- Did you receive IRS document 1095-A (Health Insurance Marketplace Statement), if yes provide form(s) 1095-A

INCOME

- Did you have any self employment income in 2023 or expect to have any in 2024?
- Do you have any investments that report income on a K-1. If YES, include ALL pages you receive in your tax documents.
- Did you receive any disability income? If yes explain.
- Did you receive any unemployment income? If yes, provide form 1099-G.

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			<p>EDUCATION</p> <p>Yes No</p> <p><input type="checkbox"/> <input type="checkbox"/> Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?</p> <p><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? If yes, provide 1098-T and copy of school's list of payments made or other documents to substantiate payments made.</p> <p><input type="checkbox"/> <input type="checkbox"/> Did you incur any expenses working as a teacher, counselor, or principal for classes kindergarten through grade 12? If yes, how much \$ _____.</p> <p><input type="checkbox"/> <input type="checkbox"/> Did you contribute to a 529 education plan or a Coverdell Education Savings account? If yes, how much \$ _____ to which state fund _____ Provide a list of names, social security numbers and amounts.</p> <p>ITEMIZED DEDUCTIONS</p> <p><input type="checkbox"/> <input type="checkbox"/> Did you make a charitable cash contribution of \$250 or more? If yes, provide receipts. Provide even if you file using the standard deduction.</p> <p><input type="checkbox"/> <input type="checkbox"/> Did you donate property with a fair market value of \$500 or more to a charity? If yes, provide a donation receipt along with a list of the property donated with the date acquired, original cost and the fair market value when contributed.</p> <p><input type="checkbox"/> <input type="checkbox"/> Do you have a Health Savings Account (HSA) medical insurance plan? If yes, provide forms 5498 and 1099-SA.</p> <p>TAX PAYMENTS AND REFUNDS</p> <p><input type="checkbox"/> <input type="checkbox"/> Did you pay any 2023 estimated taxes? If YES, fill in the amounts and dates on the Tax Organizer.</p> <p><input type="checkbox"/> <input type="checkbox"/> If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead of being refunded)</p> <p><input type="checkbox"/> <input type="checkbox"/> Do you want direct deposit if you have a refund and are not applying the refund to 2024?</p> <p><input type="checkbox"/> <input type="checkbox"/> Is your current bank account information the same as last year? If not edit the account information in the Tax Organizer</p> <p><input type="checkbox"/> <input type="checkbox"/> Do you want the balance you owe for 2023 electronically withdrawn from your bank account? If yes, what date do you want it withdrawn ____/____/2024.</p> <p><input type="checkbox"/> <input type="checkbox"/> Do you want your 2024 estimated taxes automatically withdrawn from your bank account on the due dates?</p> <p><input type="checkbox"/> <input type="checkbox"/> Do you want to pay your tax preparation fee by E-check? It is a debit to your bank account.</p>

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MISCELLANEOUS

- | Yes | No | |
|--------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to elect out of electronically filing your tax return? If yes, you will need to sign an election form which will be provided to you. |
| <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? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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, Trust or other financial account? |
| <input type="checkbox"/> | <input type="checkbox"/> | Was the cumulative value of ALL the foreign accounts for 2023 \$10,000 or more? If yes, provide the account information and amounts. |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home used for business in 2023? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any rental income in 2023? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any household employee, nanny or maid a \$2,600 or more in 2023? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or a State taxing agency? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to an individual or Trust that total more than \$17,000? |