

Please answer the following questions and submit details for any question answered "yes."

PERSONAL INFORMATION:	
1. Did any births, adoptions, marriages, separations, divorces, or deaths occur related to you, your spouse or any of your dependents for 2022? If yes, please provide the details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Did your address change during the year? If yes, provide new address and the date moved.	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Where there any changes to dependents from the prior year? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Did you have any children under age 19 or full-time students under age 24 at the end of 2022 with interest and dividend income of more than \$1,150, or total investment income of more than \$2,300?	<input type="checkbox"/> Yes <input type="checkbox"/> No
HEALTHCARE COVERAGE:	
5. Did you and your dependents have health care coverage for the full year 2022?	<input type="checkbox"/> Yes <input type="checkbox"/> No
INCOME:	
6. Were you a resident of, or did you work in more than one state, or did you receive income from more than one state during the year? You may be required to file tax returns and may also owe taxes in those states. If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Did you receive or pay any alimony or separate maintenance payments under a valid divorce decree that became effective prior to 1/1/2019?	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Did you have any foreign income or pay any foreign taxes, or receive any foreign gifts?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Did you receive any installment payments on property sales that occurred prior to 2022?	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Did you have any other income that was not disclosed on forms W-2 or 1099, including disability, unreported tip income, and state tax refunds or stimulus payments? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
PURCHASES, SALES AND DEBT:	
11. Did you buy or sell any stocks, bonds, or other investment property in 2022 that is not included on any Form 1099 or escrow closing statements you will provide us?	<input type="checkbox"/> Yes <input type="checkbox"/> No
12. Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal, or fuel cell sources? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Did you have any debts cancelled or forgiven, or did anyone owe you money which has become uncollectible? (This would include a home foreclosure or short sale or loan modification which decreased the amount of principal on your loan). If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
14. Did you pay sales or use tax on the purchase of a vehicle, boat, aircraft, or other special item in 2022? If yes, please provide the amount of sales tax paid on the item(s): _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
RETIREMENT PLANS:	
15. Did you receive a distribution from a retirement plan, such as a 401(k), IRA, SEP, SIMPLE, or other Qualified Plan?	<input type="checkbox"/> Yes <input type="checkbox"/> No

16. Did you receive qualifying Coronavirus related distributions in 2020 that you elected to include in income or repay over three years?	<input type="checkbox"/> Yes <input type="checkbox"/> No
17. Did you transfer, convert, or rollover any amount from one retirement plan to another retirement plan (including Roth)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
18. Did you contribute to a retirement plan, such as a 401(k), IRA, SEP, SIMPLE, or other Qualified Plan? Include any non-deductible IRA contributions made during the tax year. If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
19. Did you request any distributions from your IRA to be paid directly to a qualified charity (QCD)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
20. Do you have basis (from making non-deductible contributions) in any IRA accounts as of 12/31/21?	<input type="checkbox"/> Yes <input type="checkbox"/> No
21. Would you like to consider making an IRA or other retirement plan contribution to be included in your 2022 personal tax returns?	<input type="checkbox"/> Yes <input type="checkbox"/> No
ITEMIZED DEDUCTIONS:	
22. Did you work out of town for part of the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
23. If you want to claim unreimbursed mileage for business/work did you maintain mileage logs? Mileage logs are required to substantiate business/work related use of vehicles. Estimates are not allowed.	<input type="checkbox"/> Yes <input type="checkbox"/> No
24. Did you make any monetary (i.e., cash, check, credit card, etc.) charitable contributions?	<input type="checkbox"/> Yes <input type="checkbox"/> No
25. Did you make any nonmonetary (i.e., property) charitable contributions and if so, can you prove they were in good condition?	<input type="checkbox"/> Yes <input type="checkbox"/> No
ESTIMATED TAXES:	
26. Did you apply an overpayment of 2021 taxes to your 2022 estimated tax (instead of receiving a refund)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
27. If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated taxes instead of being refunded?	<input type="checkbox"/> Yes <input type="checkbox"/> No
28. Do you want any federal or state refund deposited directly to your bank account? a. If yes, enclose a voided check or provide your bank routing and account number:  _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
29. If you provided your bank information above, do you want any balance due directly withdrawn from this same bank account on the due date?	<input type="checkbox"/> Yes <input type="checkbox"/> No
30. If you provided your bank information above, do you want next year's estimated taxes withdrawn from this same bank account on the due date?	<input type="checkbox"/> Yes <input type="checkbox"/> No
31. Did you make any federal or state estimated tax payments for 2022? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
32. Do you expect a large fluctuation in your income, deductions or withholding in 2023? If yes, provide details to help us calculate your estimated tax payments.	<input type="checkbox"/> Yes <input type="checkbox"/> No
33. Are you required to pay your state taxes electronically?	<input type="checkbox"/> Yes <input type="checkbox"/> No
RENTAL PROPERTY AND BUSINESS OWNERS:	
34. Did you start a business or farm or acquire an interest in a business, entity, or trust? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
35. Did you purchase or dispose of any rental, business, or farm assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to rental, business, or farm use? If you purchased a rental property, provide the settlement statement.	<input type="checkbox"/> Yes <input type="checkbox"/> No

FOREIGN ITEMS:	
36. 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?	<input type="checkbox"/> Yes <input type="checkbox"/> No
37. Was the aggregate value of all foreign accounts in which you have authority over equal to or more than \$10,000 on any calendar day in 2022?	<input type="checkbox"/> Yes <input type="checkbox"/> No
38. Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No
39. Do you have an interest in a "specified foreign financial asset" in which the aggregate value of all such assets is greater than \$50,000? (For example, securities issued by foreign persons, interest in a foreign entity, any financial instrument or contract held for investment that has a foreign issuer or counterparty.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
40. Are you an officer, director, shareholder, or trustee or have any other interest in a foreign entity or trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No
DIGITAL ASSETS: A digital asset is any virtual currency of value that functions as a medium of exchange, a unit of account and/or a store of value. Cryptocurrency, such as Bitcoin, is an example of a digital asset. The sale or exchange or the use of digital assets to pay for goods or services, or holding digital assets as an investment, may have tax consequences that could result in tax liability.	
41. Did you hold or invest in any digital asset during 2022?	<input type="checkbox"/> Yes <input type="checkbox"/> No
42. Did you pay for any goods or services using digital assets in 2022?	<input type="checkbox"/> Yes <input type="checkbox"/> No
43. At any time during 2022, did you receive (as a reward, award, or compensation) or sell, exchange, gift or otherwise dispose of a digital asset or financial interest in a digital asset? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
MISCELLANEOUS:	
44. Do you wish to engage our services to prepare additional tax returns for your children or other family members, business entities, estates, or trusts? If yes, provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
45. Do you want our firm to file for an extension of time to file your tax returns due to an expected delay in receiving all your tax forms (such as a late K-1)? If you are expecting one or more K-1s to arrive after April 1, 2023, an extension is required.	<input type="checkbox"/> Yes <input type="checkbox"/> No
46. Do you (and your spouse) want to allocate \$3 to the Presidential Election Campaign Fund?	<input type="checkbox"/> Yes <input type="checkbox"/> No
47. Was your home rented out or used for business? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
48. Did you engage the services of any household employees? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
49. Did you receive a notice from or were you audited by either the IRS or a state taxing agency? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
50. Did you make any gifts to an individual that total more than \$16,000, or any gifts to a trust? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
51. Did you purchase merchandise outside of your state of residency or over the internet where no sales tax was paid? (Some states require or request you voluntarily pay this on your income tax returns). If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
52. Do you have an HSA account that earned any interest, dividend, capital gain or other investment income in 2022? If yes, please provide statements for 2022 as some states tax this income.	<input type="checkbox"/> Yes <input type="checkbox"/> No
53. Did you pay any child or dependent care expenses? If yes, please provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional questions or comments:

REQUIRED SIGNATURES:

_____ YOUR NAME	_____ YOUR SIGNATURE	_____ DATE
_____ SPOUSE'S NAME	_____ SPOUSE'S SIGNATURE	_____ DATE