CLIENT QUESTIONNAIRE - 2023

Client (s)_________________________ & ___________________________

Print taxpayer name here ***Print spouse name here***

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.

PERSONAL INFORMATION

Did your marital status change during the year? ____

Did your address change during the year? ____

Could you be claimed as a dependent on another person's tax return for 2023? _____________________

DEPENDENTS

Were there any changes in dependents? ____

Did you have any children under age 19 or full-time students under age 24 at the end of 2023 with interest and dividend income in excess of $1,250 or total investment income in excess of $2,500? _______

HEALTH CARE COVERAGE

Are you enrolled in a subsidized health insurance plan through the Health Insurance Marketplace? If so, please provide ***IRS document Form 1095-A Health Insurance Marketplace Statement***.

INCOME

Did you receive any disability income? ____

Did you have any foreign income or pay any foreign taxes? ______________________________________

PURCHASES, SALES AND DEBT

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? ____

Did you buy or sell any stocks, bonds or other investment property in 2023? _______________________

Did you sell or do you plan to sell any dividend-generating stocks or mutual funds during the first 60 days of 2024? ____

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? ____

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

Did you purchase an electric or fuel cell vehicle that qualifies for a clean vehicle tax credit?_________________

RETIREMENT PLANS

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? ____

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

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

Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2023? ________

EDUCATION

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? ____

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

Did you contribute to a state-sponsored 529 college savings plan?_____________________________

MISCELLANEOUS

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 any interest in any foreign assets or accounts? _______________________________________

Was your home rented out or used for business? ____

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? ____

Did your bank account information change within the last twelve months? _________________________

Did you receive, sell, send, exchange or otherwise acquire any financial interest in any digital asset? ____

Client (s)________________________ **&** ________________________

Taxpayer name Spouse name