

**We need you to complete the following questionnaire before you bring in your tax information for 2023. Please bring it along with supporting documentation for any yes answers.**

**Additional items you must bring to us:**

- W-2
- 1099 (Including 1099Rs for retirement income)
- Social Security Benefit Statement
- 1098T (College Tuition Statements)
- Form 8832 (Custodial Parent Release)
- Settlement statement on any house purchases
- Settlement statements on any business equipment purchases
- Insure Montana Tax Credit Certificate
- Marketplace Health Insurance Form 1095-A
- WOTC Credit Certificates
- Child care information including provider's federal ID number
- Cost of any stock sold (1099B)
- Photo ID or Drivers License
- Bank Account Verification
- Crypto Asset Transaction Worksheets

## Questionnaire

**Personal Information:**

**Your Name:** \_\_\_\_\_

**Current Email Address:** \_\_\_\_\_

**Current Phone Number:** \_\_\_\_\_

**Current Mailing Address:** \_\_\_\_\_

Street

\_\_\_\_\_

City

\_\_\_\_\_

State

\_\_\_\_\_

Zip

**YES**

**NO**

**Do you want your return sent via SafeSend?**

\_\_\_\_\_

\_\_\_\_\_

Did your marital status change during the year?

\_\_\_\_\_

\_\_\_\_\_

Can you be claimed as a dependent by another taxpayer?

\_\_\_\_\_

\_\_\_\_\_

Did you change your bank account this year? (We want your refund going to the right account.)

\_\_\_\_\_

\_\_\_\_\_

Did you have any adjustments to prior year tax returns?

\_\_\_\_\_

\_\_\_\_\_

**Dependent Information:**

Have there been any changes in dependents since last year?

\_\_\_\_\_

\_\_\_\_\_

Please explain: \_\_\_\_\_

Are you a non-custodial parent claiming a dependent child?

\_\_\_\_\_

\_\_\_\_\_

Do you have any children/students under age 24 with unearned income in excess of \$2,300?

\_\_\_\_\_

\_\_\_\_\_

Do you provide more than 50% support for anyone other than your children?

\_\_\_\_\_

\_\_\_\_\_

**Purchases, Sales, and Debt Information:**

Did you start a new business or purchase rental property during the year?

\_\_\_\_\_

\_\_\_\_\_

Did you acquire a new or additional interest in a partnership or S corporation?

\_\_\_\_\_

\_\_\_\_\_

Did you sell, exchange, or purchase any real estate during the year?

\_\_\_\_\_

\_\_\_\_\_

Did you acquire or dispose of any stock during the year? (If yes, include cost of stock sold.)

\_\_\_\_\_

\_\_\_\_\_

Did you take out a home equity loan this year?

\_\_\_\_\_

\_\_\_\_\_

Did you refinance a principal residence or a second home this year?

\_\_\_\_\_

\_\_\_\_\_

If yes, was the loan used for expenses other than your home?

\_\_\_\_\_

\_\_\_\_\_

Did you sell an existing business, rental, or other property this year?

\_\_\_\_\_

\_\_\_\_\_

**Continued on Reverse Side**



# Questionnaire

(Continued)

	YES	NO
<b>Income information:</b>		
Did you receive any social security benefits from retirement or disability this year?	_____	_____
Did you have interest in or signature authority over a foreign financial account this year?	_____	_____
Did you receive any income from property sold prior to this year?	_____	_____
Did you receive any lump sum payments from a pension, profit sharing or 401(k) plan?	_____	_____
Did you make any withdrawals from or contributions to an IRA, Keogh, SIMPLE, or SEP account?	_____	_____
Did you make any contributions/withdrawals to a Health Savings Account (HSA) during the year?	_____	_____
Did you make any withdrawals from an education savings/529 Plan account?	_____	_____
Did you do any IRA rollovers this year or a prior year?	_____	_____
Did you use any IRA withdrawals for higher education expenses, a home purchase or medical costs?	_____	_____
Did you receive any disability income during the year?	_____	_____
Did you cash any Series EE or U. S. Savings bonds issued after 1989?	_____	_____
Did you have any crypto asset transactions this year?	_____	_____
<b>Itemized deduction information:</b>		
Did you incur a casualty or theft loss during the year?	_____	_____
Do you have evidence to substantiate charitable contributions of \$250 or more (not just canceled checks)?	_____	_____
Did you make any non-cash charitable contributions (clothes, furniture, vehicles, etc.)?	_____	_____
Did you use your car for charitable purposes? Enter number of miles _____	_____	_____
Did you use your car for medical purposes? Enter number of miles _____	_____	_____
Did you have any educational expenses or make any student loan interest payments during the year?	_____	_____
Did you contribute to a charity directly from your IRA?	_____	_____
<b>Miscellaneous information:</b>		
Did you receive a home buyer credit that needs to be repaid?	_____	_____
Did you make total gifts of more than \$17,000 during the year to any individual?	_____	_____
Are you covered by a pension or retirement plan?	_____	_____
Did you receive correspondence from the State or Internal Revenue Service?	_____	_____
Did you make any home improvements that conserve energy?	_____	_____
Did you make any electric vehicle purchases?	_____	_____
Did you make any planned gifts this year?	_____	_____
Did you receive any dividends from a corporation?	_____	_____
<b>Business information:</b>		
Did you pay any health insurance premiums for you or your family?	_____	_____
Did you purchase any assets for business use? (If yes, please include the bill of sale.)	_____	_____
Did you pay employee wages?	_____	_____
Did you start a pension plan this year?	_____	_____
Does your business pay 50% or more of employee health insurance premiums?	_____	_____
Did you receive crop insurance or government disaster payments this year?	_____	_____
Did you pay anyone out of your business that should receive a 1099?	_____	_____
Did you sell any breeding livestock due to drought this year?	_____	_____
Did you have any breeding livestock due to be replaced by 12/31/23?	_____	_____

**Please include this checklist and engagement letter with your tax information.**