

## 2023 Tax Questionnaire

**Name:** \_\_\_\_\_ **Sign & Date:** \_\_\_\_\_

### Personal and Dependent Information:

|  | Yes   | No    |
|--|-------|-------|
| Did your marital status change?  | _____ | _____ |
| Were there any changes in dependents from the prior year?  | _____ | _____ |
| Did you or your spouse pay for child care while you or your spouse worked or looked for work?      | _____ | _____ |
| Do you have any children under age 18 with unearned income more than \$1,250?                      | _____ | _____ |
| Did you or your spouse receive an IRS Identity Protection Personal Identification Number (IP PIN)? | _____ | _____ |

### Healthcare:

If you obtained health insurance from the WA Health Plan Exchange (wahealthplanfinder.org), you must provide Form 1095-A

If you or your spouse are self-employed, provide health insurance premiums paid for your entire family: \_\_\_\_\_

Did you or your spouse have any transactions pertaining to a health savings account (HSA)? \_\_\_\_\_  
 If yes, include all Forms 1099-SA and 5498-SA.

### Deductions and Credits:

Did you or your spouse make any large purchases, such as vehicles, boats, or home remodels? \_\_\_\_\_

Did you or your spouse purchase an electric vehicle or make any residential energy-efficient improvements? \_\_\_\_\_

Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition? \_\_\_\_\_  
 If yes, include all Forms 1099-Q and 1098-T.

### Investments:

Did you or your spouse own any foreign bank accounts or financial assets? \_\_\_\_\_

Did you or your spouse refinance your home or have any debts canceled/forgiven? \_\_\_\_\_

Did you or your spouse sell, exchange, or purchase any real estate? \_\_\_\_\_

Did you or your spouse sell any securities or investment property not reported on Form 1099-B? \_\_\_\_\_

Did you contribute or would you like to contribute to an IRA or other retirement plan? \_\_\_\_\_

### Miscellaneous:

Did you or your spouse pay in excess of \$1,000 in any quarter or \$2,600 during the year for domestic services performed in or around your home to individuals who could be considered household employees? \_\_\_\_\_

Did you receive, sell, send, or exchange any financial interest in any virtual currency such as Bitcoin? \_\_\_\_\_

Do you require a state income tax return for a state you are not currently residing in? \_\_\_\_\_

If you expect a refund and would like direct deposit, please provide bank info: RTN \_\_\_\_\_ ACCT \_\_\_\_\_

Did you make any federal or state estimated tax payments? If yes, list payment amounts and dates below: \_\_\_\_\_

|              | Federal – Amount Paid | Federal – Date Paid | State – Amount Paid | State – Date Paid |
|--------------|-----------------------|---------------------|---------------------|-------------------|
| Q1 (4/18/23) | _____                 | _____               | _____               | _____             |
| Q2 (6/15/23) | _____                 | _____               | _____               | _____             |
| Q3 (9/15/23) | _____                 | _____               | _____               | _____             |
| Q4 (1/16/24) | _____                 | _____               | _____               | _____             |