

2 0 2 2 INCOME TAX QUESTIONNAIRE

Please answer each question as accurately as possible. The information you provide will help ensure the accuracy of your tax returns (reducing the likelihood of audits, interest, and penalties), and will assist in ensuring that you receive all deductions for which you are qualified (saving you money).

Taxpayer Name

Spouse Name

Street Address/City/State/Zip Code

Phone#

Resident of [] IL [] MO [] _____

I/We would like to sign electronically YES
(See Other on page 3)

GENERAL

	<u>YES</u>	<u>NO</u>	<u>N/A</u>	<u>NOT SURE</u>
1. Have you had a change in filing status since last year? (ex. married, divorced, widowed, legally separated)	_____	_____	_____	_____
2. Has your address changed from the address shown on last year's tax return?	_____	_____	_____	_____
3. Is your social security number correct on all forms?	_____	_____	_____	_____
4. Did you make any estimated income tax payments for 2022? Please provide dates and amounts	_____	_____	_____	_____
5. Do you have more than \$10,000 in a foreign bank account or did you have foreign income?	_____	_____	_____	_____
6. Are you an elementary or high school teacher?	_____	_____	_____	_____
7. Would you like direct deposit/withdrawal of your 2022 refund/balance? (NOTE: refunds can be split between as many as 3 different accounts, including IRAs)	_____	_____	_____	_____
8. Did you have any debt cancelled (credit card or other)? If so, please provide 1099-C form	_____	_____	_____	_____
9. Were you or anyone in your family a target of identity theft the past 5 years? If so, were you issued a PIN by IRS?	_____	_____	_____	_____
10. Did you have health insurance coverage through the Marketplace plan and receive Form 1095-A?	_____	_____	_____	_____
11. Did you sell anything using a credit card processor for which they sent you a 1099-K? If so, provide details	_____	_____	_____	_____
12. Did you purchase an electric vehicle, solar panels, install geothermal HVAC system or regular high efficiency HVAC or doors or windows? If so, provide receipts	_____	_____	_____	_____

DEPENDENTS

13. Have you had a change in dependents since last year? (ex. have/adopt a baby, have a child reach age 24, etc.)	_____	_____	_____	_____
14. Did any dependents under age 24 have income? (Please provide information for any claim who reside with you)	_____	_____	_____	_____

(OVER)

	<u>YES</u>	<u>NO</u>	<u>N/A</u>	<u>NOT SURE</u>
15. Did you pay over \$250 in education expenses to a private Illinois elementary or secondary school?	_____	_____	_____	_____
16. Did you pay into or withdraw from a college savings plan (Sec 529/Coverdell/Educational IRA) or cash Series EE Savings Bonds to pay qualified higher education expenses?	_____	_____	_____	_____
17. Did you, your spouse or a dependent pay college tuition, expenses (not room/board)?	_____	_____	_____	_____
18. Could you be claimed as a dependent by another taxpayer?	_____	_____	_____	_____
19. Did you pay for childcare while you worked or looked for work? If so, please list provider name, address, ID# and amount paid	_____	_____	_____	_____
20. Please list all dependents you can claim on your 2022 return	_____	_____	_____	_____

INCOME

21. Are the figures on your W-2 & 1099 forms correct or reasonable?	_____	_____	_____	_____
22. Did you change employers last year?	_____	_____	_____	_____
23. Did you have any other income not reported on Form W-2 or 1099 (tips, etc.)?	_____	_____	_____	_____
24. Did you engage in any bartering/trading of goods or services during the year?	_____	_____	_____	_____
25. Did you receive any court awards during the year?	_____	_____	_____	_____
26. Did you pay or receive alimony during the year? What was finalization date of divorce decree _____	_____	_____	_____	_____
27. Did you receive any unemployment benefits in 2022?	_____	_____	_____	_____
28. Did you receive any social security benefits or disability income in 2022?	_____	_____	_____	_____
29. Did you work in another state or the City of St Louis?	_____	_____	_____	_____
30. Did you or your spouse pay into or intend to pay into an IRA, Roth IRA or retirement plan in addition to one you may have through your job?	_____	_____	_____	_____
31. Did you receive distributions from a retirement plan/IRA, or rollover any retirement account even if you received no money?	_____	_____	_____	_____
32. Have you ever made non-deductible Traditional IRA contributions? If so, provide details.	_____	_____	_____	_____
33. Did you receive any executor fees or jury duty pay?	_____	_____	_____	_____
34. Do you expect your 2023 taxable income or withholdings to be substantially different from 2022?	_____	_____	_____	_____

(PLEASE PROCEED TO PAGE 3)

If you answered yes on #7, please provide your bank information or include a cancelled check. IRS requires that we verify banking information every year.

Bank name _____ Routing Number _____ Account Number _____ Checking
 Savings

If you believe you may qualify for the earned income credit, please ask for the EIC Questionnaire. We cannot complete any return that claims the credit without the questionnaire being completely filled out.

If you believe you may qualify for the Illinois Real Estate Assessment Freeze (over age 65) form P-TAX340 and your total income is expected to be below \$65,000 for 2022 check here []

WE MUST HAVE THE FOLLOWING IF THEY APPLY:

Form W-2 and 1099-INT statements

If you directed part of an IRA distribution to a charity please provide details so it is not taxed

Form 5498 or year end statement from all IRA accounts showing the year end values

1099-K form if you sold anything online for more than \$600 for the year

1099-G from the state for any Unemployment compensation received

1099-E if you paid student loan interest

Brokerage year end tax packet **with 1099** -- including securities sales and cost basis

Printouts or ledgers if you bought or sold cryptocurrency or digital assets

Closing statements if you sold any real estate

HSA statement for any contributions or withdrawals

1098-T Tuition statement from college or university and **receipts** for any other expenses (books, supplies)

Form 1095A if you had health insurance through the government exchange

Signature of person completing this form

Date

Any Questions or concerns you would like addressed:
