2022 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				Р	hone#	
Resident of [] IL [] MO []		(See Other on page 3)				_
<u>GE</u>	NERAL		YES	<u>NO</u>	<u>N/A</u>	NOT SURE
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 202 Please provide dates and amounts	22?				
5.	Do you have more than \$10,000 in a foreign bank account or did you have foreign income?	t				
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 thef the past 5 years? If so, were you issued a PIN by IRS?	t		,		
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	,				
DE	PENDENTS					
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)

	-	YES	NO_	N/A	NOT SURE
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)?		A		
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	paner are consumer and the consumer			
	MARKAN AND AND AND AND AND AND AND AND AND A				
INC	COME				
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?	<u></u>			
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?				

		YES	NO_	N/A	NOT SURE
<u>DE</u>	DUCTIONS				
35.	Did you purchase, sell, or refinance your principal home, a second home, or take out a home equity loan?				
36.	Did you participate in a health savings account (HSA)? If so, please provide documentation (both contrib and withdrawl).	 			
37.	Did you pay any medical or long term health care insurance premiums (including Medicare supplements) or expenses?				
38.	Did you make any charitable contributions or donate a vehicle, boat or other personal property? (provide receipts)				
39.	Did you pay any student loan interest?				
40.	Did you pay any mortgage interest on your primary residence or a second residence?				
<u>IN\</u>	/ESTMENTS/BUSINESS				
41.	Did you pay any real estate taxes on any property in 2022?				
42.	Did you sell any stocks, bonds, or real estate this year?				
4 3.	Have you been notified that any of your stocks are worthless?	·			
44.	Did you receive any income which is exempt from federal taxes? (ex., municipal bond interest)				
45.	Did you pay a penalty on early withdrawal from a CD?				
46.	Are you invested in any registered tax shelters?				
47.	Did you actively participate in the operation of any partnerships, S corporations, LLCs, or rental property for which you are reporting an income or loss?				
48.	Did you have any business bad debts?				
4 9.	Did you elect to defer payment of self-employment taxes from 2020?				
50.	Did you keep a mileage log on any vehicle you used for your business or income producing property?				
51.	Did you participate in the buying/selling or use of virtual Currency or (aka cryptocurrency) like Bitcoin)?				
52.	Did you buy, sell, gift or otherwise receive or dispose of any digital assets?				
от	HER				
ot t	returns are required to be electronically filed. We offer elec he return along with the source documents. If you would lik ge 1 and provide emails below.	tronic sign e to sign e	ature and delectronical	delivery of ly check bo	your copy ox at top of
Tax	payer email Spouse ema	il			

If you answered yes on we verify banking inform	#7, please provide your ation every year.	bank information or include	e a cancelled checl	k. IRS requires that			
Bank name	Routing Number	Account Number		Checking Savings			
If you believe you may quany return that claims the	nalify for the earned incon credit without the question	ne credit, please ask for the onnaire being completely fill	EIC Questionnaire. ed out.	We cannot complete			
If you believe you may qu total income is expected t	ralify for the Illinois Real E to be below \$65,000 for 2	Estate Assessment Freeze (2022 check here []	over age 65) form F	P-TAX340 and your			
WE MUST HAVE THE	FOLLOWING IF THE	EY APPLY:					
Form W-2 and 10	99-INT statements						
If you directed par	rt of an IRA distribution to	a charity please provide de	etails so it is not taxe	ed			
Form 5498 or yea	r end statement from all I	IRA accounts showing the y	ear end values				
1099-K form if you	a sold anything online for	more than \$600 for the yea	r				
1099-G from the s	1099-G from the state for any Unemployment compensation received						
1099-E if you paid	1099-E if you paid student loan interest						
Brokerage year e	nd tax packet <u>with 1099</u> -	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						
	-	niversity and <u>receipts</u> for ar	• • • • • • • • • • • • • • • • • • • •	oooks, supplies)			
Form 1095A if you	u had health insurance th	rough the government exch	ange				
<u>C:</u>							
Signature of perso	n completing this fo	rm		Date			
Any Questions or co	ncerns you would lik	e addressed:					