

# 2023 INCOME TAX QUESTIONNAIRE

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

\_\_\_\_\_  
Taxpayer Name

\_\_\_\_\_  
Spouse Name

\_\_\_\_\_  
Taxpayer Email

\_\_\_\_\_  
Spouse Email

\_\_\_\_\_  
Street Address/City/State/Zip Code

\_\_\_\_\_  
Phone #

Resident of:  IL  MO  \_\_\_\_\_

**I/we would like to sign electronically  YES**

<b>Yes</b>	<b>No</b>	<b>GENERAL</b>
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- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Have you had a change in filing status since last year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Has your address changed from the one shown on last year's return?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Is your social security number correct on all forms?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any estimated payments? If so, provide details   |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have \$10,000 or more in a foreign bank account?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income, not reported on 1099s?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you an elementary or high school teacher?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like direct deposit of your 2023 refund if applicable?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like to have any balance due for 2023 directly withdrawn from your bank account?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debt cancelled in 2023? Please provide 1099-C form if so   |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you issued and e-file PIN by the IRS? If so, please provide  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have health insurance through the marketplace (Obamacare)? If so, please provide form 1095-A   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a 1099-K for 2023? If so, please provide information  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new or used electric or hybrid vehicle in 2023? If so, please provide bill of sale including VIN, date of purchase and vehicle model |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you install solar panels, geothermal HVAC, exterior doors, or windows? If so, provide receipt   |

**(OVER)**

<b>Yes</b>	<b>No</b>	<b>DEPENDENTS</b>
<input type="checkbox"/>	<input type="checkbox"/>	Have you had a change in dependents since last year? If so, provide information
<input type="checkbox"/>	<input type="checkbox"/>	Did any dependents under 24 have income? If so, provide information
<input type="checkbox"/>	<input type="checkbox"/>	Did you pay over \$250 in education expenses to a private Illinois K-12 School?
<input type="checkbox"/>	<input type="checkbox"/>	Did you pay into a college savings plan (Section 529 plan)?
<input type="checkbox"/>	<input type="checkbox"/>	Did you withdraw from a college savings plan or sell EE bonds to pay college tuition?
<input type="checkbox"/>	<input type="checkbox"/>	Did you or a dependent pay college expenses (tuition, books, fees)?
<input type="checkbox"/>	<input type="checkbox"/>	Could you be claimed as a dependent by another taxpayer?
<input type="checkbox"/>	<input type="checkbox"/>	Did you pay for childcare while you worked or looked for work? If so, provide details
		Please list all dependents you can claim on your 2023 return

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<b>Yes</b>	<b>No</b>	<b>INCOME</b>
<input type="checkbox"/>	<input type="checkbox"/>	Are the figures on your W-2 and 1099 forms correct or reasonable?
<input type="checkbox"/>	<input type="checkbox"/>	Did you change employers last year?
<input type="checkbox"/>	<input type="checkbox"/>	Do you have any income not reported on W-2 or 1099? If so, provide details
<input type="checkbox"/>	<input type="checkbox"/>	Did you engage in bartering/trading of goods or services during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any court awards during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive alimony during the year? Date of divorce decree _____
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any unemployment benefits during 2023?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any social security benefits or disability income in 2023?
<input type="checkbox"/>	<input type="checkbox"/>	Did you work in another state?
<input type="checkbox"/>	<input type="checkbox"/>	Did you live or work in the City of St Louis?
<input type="checkbox"/>	<input type="checkbox"/>	Have you/will you contribute to a personal IRA account? If so, provide details
<input type="checkbox"/>	<input type="checkbox"/>	Did you make charitable contributions from your IRA account? If so, provide details
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive distributions from a retirement plan/IRA in 2023?
<input type="checkbox"/>	<input type="checkbox"/>	Did you rollover money from a traditional IRA to a ROTH IRA in 2023?
<input type="checkbox"/>	<input type="checkbox"/>	Have you ever made non-deductible traditional IRA contributions in the past? If so, please provide details – if we don't already have that information
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any trustee fees, executor fees or jury duty pay?
<input type="checkbox"/>	<input type="checkbox"/>	Do you expect your 2024 taxable income or withholding to substantially change?

**(Please proceed to page 3)**

- | <b>Yes</b>               | <b>No</b>                | <b>DEDUCTIONS</b>   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell or refinance your principle or second home or HELOC?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you participate in a health savings account (HSA)? If so, provide details |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any medical or long term health care insurance premiums?          |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any charitable contributions or donate anything non-cash?        |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any student loan interest? If so, provide 1099-E                  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any mortgage interest? If so, provide 1098 forms                  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any real estate taxes on property in 2023?                        |

- | <b>Yes</b>               | <b>No</b>                | <b>INVESTMENTS/BUSINESS</b>  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell any stocks, bonds or real estate in 2023? Provide documentation   |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you been notified that any of your stocks are worthless?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any income exempt from federal tax?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay a penalty on early withdrawal from a CD?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you invested in any registered tax shelters?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you participate in the operation of any partnerships, corporations, LLCs or rental property for which you are reporting an income of a loss? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any business bad debts?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you keep a mileage log on any vehicle you used for business or income producing property?  |

- | <b>Yes</b>               | <b>No</b>                | <b>OTHER</b>   |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to any individual that total more than \$17,000? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any gifts or contributions to a trust?                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your bank account information change in the last year?                             |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive, buy, sell or dispose of any digital currency or assets?               |

For direct deposit or withdrawal purposes please provide the following information:

				<input type="checkbox"/> Checking <input type="checkbox"/> Savings
Bank Name	Routing #	Account #		

**(OVER)**

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-TAX 340 and your total income is expected to be below \$65,000 for 2023 check here [ ]

**WE MUST HAVE THE FOLLOWING IF THEY APPLY:**

Form W-2 and 1099-INT statements

If you directed IRA distributions directly to a charity please provide details

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

1099-K form if you sold anything online and received payments of more than \$20,000

1099-G from the state for any unemployment compensation received

1099-E if you paid student loan interest

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

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

Closing statements if you sold any real estate – along with purchase information

Health Savings Account statements showing contributions or distributions

1099-T tuition statement from college or university and receipts for any other deductible expenses

Form 1095-A if you have health insurance through the government exchange

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Signature of person completing this form

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Date

Any questions or concerns you would like addressed:

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