

2023

1040

US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2023? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2023? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2023, with interest and dividend income in excess of \$1,250, or total investment income in excess of \$2,500? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay a daycare provider or someone else to care for your child aged 12 or younger and did you (and your spouse if applicable) have earned income in 2023? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive the Arizona Families Tax Rebate in November or December of 2023? If so, please provide the form 1099-Misc showing this amount. If you did not receive this form, you can access it here: https://familyrebate.aztaxes.gov/ |

HEALTH CARE COVERAGE

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have health insurance through the Federal Health Insurance Marketplace? If so, please provide your IRS document Form 1095-A showing the details of this coverage. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a health savings account during 2023? If so, please provide the 1099-SA form showing payments made from the account and form 5498-SA showing contributions to the account. |

INCOME

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive more than \$10 of interest income from any bank or financial institution during 2023? If so, please provide all applicable 1099-INT forms. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |

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Did you have any foreign income or pay any foreign taxes?

PURCHASES, SALES AND DEBT

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

Did you buy or sell any stocks, bonds or other investment property in 2023?

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

Did you make any residential energy-efficient improvements?

Did you have any debts cancelled or forgiven?

RETIREMENT PLANS

Did you receive a distribution (payment) from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you transfer or rollover any amount from one retirement plan to another retirement plan?

Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2023?

EDUCATION

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

ITEMIZED DEDUCTIONS

Did you pay any mortgage interest during 2023? If so, please provide any 1098 mortgage interest forms received.

Did you make any cash or noncash (Goodwill, etc.) charitable donations during 2023? If so, please provide the details of any donations.

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ESTIMATED TAXES

- Did you apply an overpayment of 2022 taxes to your 2023 estimated tax (instead of being refunded)?
- Do you expect your 2024 taxable income and withholdings to be different from 2023?

TAX REFUNDS AND PAYMENTS

- If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead of being refunded)?
- If you have a Federal or state tax refund would you like them directly deposited?
- If you have a Federal or state balance due would you like them directly debited from your account? If so, the date of withdrawal will default to April 16th (the due date of the payment). Let us know if you would like this debited sooner.
- If you would like any amounts directly deposited or withdrawn, would you like the same account used on your 2022 returns?

MISCELLANEOUS

- May the IRS discuss your tax return with your preparer?
- Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- Was your home rented out or used for business?
- Did you engage the services of any household employees?
- Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
- Did you or your spouse make any gifts to an individual that total more than \$17,000, or any gifts to a trust?
- At any time during the tax year, did you: receive or sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Please indicate whether you would like a paper or PDF (electronic) copy of your completed returns for your records, or if you would like both.

Other Notes/Information: