

2023 Personal Tax Return Checklist/Questionnaire

Personal Information

* Did your marital status change? If yes, explain: _____

Yes	No

**NOTE: Please include copies of any relevant legal divorce decrees and documents.

* Did your residence change? If yes, new address: _____

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Please include closing statements. _____

* Can you be claimed as a dependent by another taxpayer?

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* Did you pay more than 50% of the cost to maintain the household?

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Dependent Information ****If you do not have dependent(s), please go to next section.**

* **If you are a non-custodial parent that wants to claim the dependency exemption for your child(ren), you must have a signed form 8332 from the custodial parent.**

Yes	No

* Were there any changes in dependents from the prior year?

If yes, explain: _____

If birth/new child: please include name, date of birth and Social Security number of new child.

* Do you have any children with unearned income in excess of \$2500?

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* Did your dependent pay any tuition or qualified higher education expenses in 2023? If yes: include 1098T

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Amount: _____ Year of schooling (i.e., sophomore): _____

Amount of grants/scholarships: _____ Child's name: _____

* If your child is in their first four years of college, please include amount paid for books and supplies:

* Did your dependent pay any student loan interest this year? If yes, please include 1099.

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* Did your dependent pay any part of their student loan? If yes, amount paid? _____

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* Was any part of the student loans forgiven? If so, how much? _____ Please include 1099C

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* Did you contribute to an Education Savings Account (i.e. Ed Vest) this year?

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If yes, please include account statements.

* Did you maintain a home for someone not claimed as a dependent? (Head of Household)

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* Did you pay for child care? (babysitting, daycare) If yes, please include care giver information and amount.

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* Do you have a child that had earned income? If yes, please let us know if you need us to prepare a return.

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* Did you have any distributions for Section 529 Plan? If yes, please include paperwork.

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Income Information

* Did you/spouse have income from W-2s? If yes, please include all W-2 forms.

Yes	No

* Did you/spouse have any income from active or inactive military pay? If yes, please include all documents.

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* Did you/spouse receive any 1099 forms for: **interest, dividends, retirement, Social Security, disability, unemployment, gambling winnings, etc.** If yes, please include all 1099s.

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* Did you/spouse take any distributions or rollover amounts from an IRA or Pension? If yes, please include 1099.

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* Did you receive a refund from your state income tax return in the prior year?

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* Are you/spouse a partner in a partnership, shareholder in a S-Corporation, or a member of an LLC?

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If yes, please include K-1s, K-2s, and K-3s.

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Income Information (cont.)

- * Are you/spouse a beneficiary to a trust? If yes, please include K-1s.
- * Did you/spouse sell any stock or mutual funds? If yes, please include all 1099s and purchase details.
- * Did you/spouse exercise any stock options? If yes, please include all supporting documents.
- * Did you receive/pay alimony from a pre-2018 divorce?
If yes, please provide amount and name/Social Security number of ex-spouse. _____
- * Did you receive jury duty pay? If yes, please include amount. _____
- * Did you/spouse start/dispose of a business in 2023?
- * Did you/spouse have any foreign income, foreign bank account or pay any foreign taxes? If yes, please include information.
- * Did you/spouse cash in any US Savings Bonds? If yes, please include.
- * Please list any OTHER income not listed above: _____

Yes	No

Itemized Deduction Information

- * Did you own a home? If yes, please include:
 - *All 1098 mortgage interest statements
 - *Copy of real estate tax bill
 - *Copy of **receipt** for real estate taxes paid in 2023.
- * Did you buy, sell, refinance, or take a home equity credit line on any real estate in 2023?
If yes, please include copy of closing statements.
- * Do you have a Home Equity Line of Credit? If yes, what did you use it for?

Yes	No

Please include 1098 for interest paid

- * Did you/spouse donate any cash or non-cash items to charitable contributions?
If yes, please include all receipts and lists of items donated with corresponding value amounts.
- * Did you make a contribution or take a distribution from a HSA? If yes, please include statements.
****NOTE:** "Health Savings Accounts" are medical savings accounts supported by a high deductible health insurance plan feature. These are not "FSA" (Flexible Spending Accounts) which are executed through your employer.
- * Do you have health insurance?
- * Did you/spouse pay any health insurance premiums "out of pocket"? This doesn't include any "pre" tax health insurance deductions from your pay. If yes, how much? _____
- * Did you purchase health insurance through the Exchange Market Place? If yes, we will need Form 1095A
- * Did you/spouse pay any "long term care" insurance premiums? If yes, how much? _____
Please include a 1099-LTC for any distributions taken to pay for nursing home care in 2023.
- * Did you receive any health insurance premium refunds?
- * Did you/spouse contribute to an IRA? If yes, please include year end statements.
- * Did you/spouse convert a traditional/SEP/SIMPLE IRA to ROTH IRA? Please include 1099R
- * Did you pay any medical expenses "out of pocket" (i.e. co pays)? If yes, please include amount. _____
- * Teachers, did you spend over \$300 for education expenses? If yes, please include amount. _____

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Miscellaneous Information

- * Did you file bankruptcy or have a foreclosure on your home In 2023?
- * Did you/spouse purchase any items that would have an energy credit? If yes, please include receipt of purchase.
- * Would you/spouse like to contribute to the Federal Election Campaign Fund?
- * Did you purchase an electric vehicle or home charger? Please provide paperwork.
- * Did you have any tax correspondence from the federal or state governments? If yes, please include copies.
- * Did you have any theft or casualty loss unreimbursed by insurance? If yes, include paperwork.
- * Did you/spouse gift any one person more than \$15,000 of money or property in 2023?
- * Did you/spouse barter with anyone for property or services?
- * Did you buy, sell or dispose of virtual currency/digital assets in 2023?
- * Did you have a marital property agreement? If yes, please provide us with a copy.

Yes	No

Estimated Tax Payments Made

- * Did you make any Federal estimated tax payments? If yes, please list below.

Date	**1st Qtr. (4/15/23)	_____	Amount	_____
Date	**2nd Qtr. (6/15/23)	_____	Amount	_____
Date	**3rd Qtr. (9/15/23)	_____	Amount	_____
Date	**4th Qtr. (1/15/24)	_____	Amount	_____

Yes	No

- * Did you make any State estimated tax payments? If yes, please list below.

Date	**1st Qtr. (4/15/23)	_____	Amount	_____
Date	**2nd Qtr. (6/15/23)	_____	Amount	_____
Date	**3rd Qtr. (9/15/23)	_____	Amount	_____
Date	**4th Qtr. (1/15/24)	_____	Amount	_____

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Rental Property Information ****If you do not own a rental property, please go to next section.**

- * Did you own a rental property? If yes, please include the following information:

- *Rental income _____
- *Advertising expenses _____
- *Mileage for auto expenses _____
- *Cleaning and maintenance expenses _____
- *Insurance premiums paid _____
- *Legal or professional fees, including accounting _____
- *Mortgage interest, please include form 1098 _____
- *Repairs expenses _____
- *Supplies expenses _____
- *Real estate tax bill AND receipt of taxes paid in 2023 _____
- *Utilities expenses _____
- *Other Expenses _____

Yes	No

- * Did you use any subcontractors?

*Did you issue forms 1099 Misc.?

- * Did you spend more than 250 hours maintaining the property

- * If you have more than 1 rental property. Please call for rental spreadsheet.

Business Income/Expenses ****If you do not have a business, please go to the next section.**

* Did you/spouse have a business? If yes, please supply documentation to support the following:

*All income produced

*Cost of Goods Sold/purchases and Inventory ending 12-31-2023

*All business related expenses, please include list and detail.

*All business mileage.

*Did you use any subcontractors?

*Did you issue forms 1099 Misc.?

*Have you received payment(s) for services or sales with virtual currency/digital payment?

If yes, did you receive a 1099?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

WISCONSIN Information

* Were you a resident of Wisconsin for all of 2023? If no, please include other state of residence and date moved to/from Wisconsin. _____

* Did you/spouse purchase any large ticket items in 2023? (i.e. boat)

If yes, how much did you pay in sales tax on those items? Please include copies of receipts.

* Did you/spouse purchase any items out of state or on the internet without paying sales tax?

This Does include digital downloads.

If yes, please include receipts or total paid on these purchases. **If no, please initial here.**

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

* Did you/spouse pay rent for your personal residence?

If yes, what was the total rent paid in 2023? _____

Was heat included?

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

* Would you like to make any donations to the following charities on your Wisconsin return?

*Endangered Resources Amount: _____ *Military Family Relief Amount: _____

*Cancer Research Amount: _____ *Second Harvest Amount: _____

*Veteran's Trust Fund Amount: _____ *Red Cross WI Disaster Relief Amount: _____

*Multiple Sclerosis Amount: _____ *Special Olympics Amount: _____

****NOTE:** Donations made will increase the amount of your tax owed or decrease the amount of your refund.

* Did you/spouse pay income taxes to any other state? If yes, please include.

* Did you/spouse payout for private school tuition?

If Yes-Name _____ Grades _____ Amount Paid \$ _____

If Yes Name _____ Grades _____ Amount Paid \$ _____

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Income Included for WISCONSIN Homestead Credit Claims

* Did you/spouse receive any AFDC or General Relief? If yes, amount? _____

* Did you/spouse receive any Supplemental Security income? If yes, amount? _____

* Did you/spouse receive any Veteran's Pensions or Disability? If yes, amount? _____

* Did you/spouse receive any Workman's Compensation benefits? If yes, amount? _____

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>