

Name: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Best time to Call: \_\_\_\_\_  
 Email: \_\_\_\_\_

- 1) Any change in Marital Status YES NO
- 2) Any change in Dependents YES NO
- 3) New Driver's License - need a copy YES NO
- 4) Move/Buy/Sell/Refinance your Home YES NO

Need the settlement sheets & date moved

5) Did you/spouse have a financial interest in or signature authority over a financial account (bank, brokerage)

located in a foreign country? YES NO

6) At any time, did you/spouse: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)? YES NO

7) Do you want direct deposit to the same bank account that we have on file? YES NO If new bank, provide:

Bank Name: \_\_\_\_\_  Checking  Savings

Routing # \_\_\_\_\_ Account # \_\_\_\_\_

### INCOME

- 8) Wages Income **Form W2** YES NO
- 9) Any Tips not reported on your W-2 YES NO
- 10) Social Security **Form 1099-SSA** YES NO
- 11) Retirement or IRA withdraw **Form 1099-R** YES NO  
 Age 72 in 2022 Required Minimum withdraw is in 2022  
 Age 72 in 2023 Required Minimum withdraw is in 2023
- 12) Convert an IRA to a ROTH – Statements YES NO
- 13) Partnership or S-Corp Income **Form K-1** YES NO
- 14) Receive Interest, Cash-in Bonds **1099-INT** YES NO
- 15) Dividends **1099-DIV** or Sell Stocks **1099-B** YES NO
- 16) Solar or Geo-Thermal SREC Income YES NO
- 17) Unemployment **Form 1099-G** YES NO
- 18) Jury Duty Income YES NO
- 19) Alimony Paid or Received YES NO
- 20) Receive an Inheritance (you might get a **K-1**) YES NO
- 21) Cancellation of Debt **Form 1099-C** YES NO
- 22) Gambling Winnings **Form W-2G** YES NO
- 23) Any Side Hustle / Hobby Income YES NO
- 24) Start a Business in 2023 YES NO  
 Did you Incorporate or Open an LLC in 2023 YES NO
- 25) Receive **Form 1099-MISC** or **Form 1099-NEC** YES NO
- 26) Receive Money via an App **Form 1099-K** YES NO  
 VENMO, Cash App, PayPal, eBay, Stripe, Etsy, etc...  
 If you sold items please provide the cost of the items sold
- 27) Rent out your Home or Another Property YES NO
- 28) Receive funds from a lawsuit/settlement YES NO
- 29) Any Foreign Income from outside the USA YES NO
- 30) Receive a Scholarship YES NO

### DEDUCTIONS & CREDITS

- 31) Contribute to an IRA or ROTH - Statements YES NO
- 32) Contribute to a 529 Plan - Statements YES NO  
 Withdraw from 529 Plan – Statement YES NO
- 33) Contribute to ABLE Account – Statements YES NO
- 34) Contribute to HSA (Health Savings Account) YES NO  
 Distributions from HSA **Form 1099-SA** YES NO
- 35) Educator/Teacher Classroom Expenses YES NO  
 max \$300 for expenses for K thru 12 must work 900 hrs yr
- 36) Paid on Student Loans **Form 1098-E** YES NO
- 37) Adopt a Child – Detailed list of expenses YES NO
- 38) Union Dues Paid - Provide YTD paystub YES NO
- 39) Are you a retired Correction or Public Safety Officer  
 YES NO From a State of Maryland Employer YES NO
- 40) Are you a Volunteer Fire/Rescue/Ambulance YES NO
- 41) Mortgage Interest Paid **Form 1098** YES NO
- 42) 2<sup>nd</sup> Home/RV/Boat Mortgage Interest Paid YES NO
- 43) Property Taxes Paid YES NO
- 44) Personal Property Tax Paid (VA, CT, MI, RI) YES NO
- 45) Charitable Contributions IRS Search tool to verify tax  
 exempt status: <https://apps.irs.gov/app/eos/> YES NO  
 Need receipts/letter with date, amount paid
- 46) Excessive Medical Expenses Paid YES NO  
 Must itemize and expenses are in excess of 7.5% of AGI
- 47) Does everyone have health care coverage YES NO  
 Health Insurance from Marketplace **1095-A** YES NO  
 Do you authorize sharing your tax information with the  
 Maryland Health Exchange to determine options for  
 health care coverage? Need your email address YES NO
- 48) Daycare Expenses Paid - Need statements YES NO
- 49) College Tuition Expenses Paid **Form 1098-T** YES NO  
 Provide statements for tuition, housing, & books paid.  
 Student Name: \_\_\_\_\_ Full-Time or Part-Time
- 50) Purchase an Electric Vehicle YES NO  
 Need: Year, Make, Model, VIN, Date Placed in Service
- 51) Energy-Efficient Improvements YES NO  
 If yes, provide documentation & amount. **Energystar.gov**  
No Install Cost: Insulation, Windows (max \$600)  
 Exterior doors (max \$250 per door, \$500 total)  
 Home energy audits of a main home (max \$150)  
Include Install Cost: Central A/C, furnaces, boilers,  
 water heaters, heat pumps, heat pump water heaters,  
 bio mass stoves and boilers, geothermal, solar, wind
- 52) Pay 2023 Estimated Taxes YES NO  
 For each payment provide: Paid To, Date Paid, Amount  
 Notes for tax preparer \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
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