|  |  |  |
| --- | --- | --- |
| Yes | No |  |
|  |  | Did your marital status or number of dependents change this year? |
|  |  | Did/will any of your dependents file their own tax return this year? |
|  |  | Has your address changed since your last filed tax return? |
|  |  | Did you or anyone on your tax return receive an IP PIN from the IRS? |
|  |  | Are you or anyone on your tax return legally blind or totally and permanently disabled? |
|  |  | Did you have any interest or signature authority over a bank/securities/financial account in a foreign country? |
|  |  | Did you buy, sell, refinance, or exchange any property or assets during the year? |
|  |  | Did you receive (as a reward, award, or compensation) or sell, exchange, or otherwise dispose of a digital asset\* or a financial interest in a digital asset? \*A digital asset is any virtual currency of value that functions as a medium of exchange, a unit of account and/or a store of value. Cryptocurrency, such as Bitcoin, is an example of a digital asset. |
|  |  | Did you begin a new business or sell a business this year? |
|  |  | Did you receive any income from unemployment, gambling, awards, prizes, lottery, or hobby activities? |
|  |  | Did you own a property that you rented out during this year? |
|  |  | Did you receive any income from Social Security this year? |
|  |  | Did you receive any funds from a retirement account? |
|  | | If so, did you make a qualified charitable distribution?  Yes  No |
|  |  | Did you contribute any funds to a retirement account other than on your W2? |
|  |  | Would you like to maximize your retirement contributions, if eligible? |
|  |  | Did you or anyone on your tax return attend a post-secondary school during the year? |
|  |  | Did you make any withdrawals from an education savings or 529 plan during the year? |
|  |  | Did you pay any student loan interest this year? |
|  |  | Did you receive any forgiveness of debt during the year, including cancelation of student loans or other indebtedness during the year |
|  |  | Did you cash any Series EE or I US Savings Bonds during the year? |
|  |  | Did you purchase health insurance through the Marketplace? |
|  |  | Did you make any contributions or withdrawals from a Health Savings Account (HSA)? |
|  |  | Do you have any mortgage interest, charitable contributions, out-of-pocket medical expenses, or property or vehicle taxes? |
|  |  | Did you make gift(s) to any person that total more than $17,000 this year? The gift(s) could have been made directly, indirectly or to a trust. |
|  |  | Did you gift/donate any stock this year? |
|  |  | Did you make a qualified residential energy efficient improvement, or purchase solar, wind, geothermal, or fuel cell energy resources? If so, please provide invoices you paid along with the tax credit certificate received. |
|  |  | Did you purchase a clean energy (electric) vehicle? If yes, provide the purchase invoice and note whether new or used. |
|  |  | Did you receive any correspondence from the IRS or the state? |
|  |  | Do you want to have any refunds direct deposited? |
|  |  | Do you want to have any tax payments due or estimated tax payments drafted from your bank account? |
|  |  | Did you pay any estimated tax payments this year? |
|  |  | Do you want an extension for your tax return? (File after April 15th) |

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| --- | --- |
| Income/Deduction Type | Related Tax Form |
| Wages | **Form W2** |
| Interest and Dividends | **Form 1099-INT and 1099-DIV** |
| Sale of Stocks, Securities, Capital Assets | **Form 1099-B** |
| Miscellaneous Income | **Form 1099-MISC and 1099-NEC** |
| Retirement/Pension Distributions | **Form 1099-R** |
| Retirement Contributions | **Form 5498** |
| Social Security Income | **Form SSA-1099** |
| Pass-thru Income (LLC’s, S Corps, Partnerships, Trust, Estates) | **Schedule K-1** |
| Unemployment Compensation | **Form 1099-G** |
| Mortgage Interest | **Form 1098** |
| Health Savings Account (HSA or MSA) | **Forms 1099-SA & 5498-SA** |
| Healthcare Coverage or Insurance | **Form 1095-A** |
| Student Loan Interest | **Form 1098-E** |
| Tuition | **Form 1098-T** |
| Distribution from Education Savings Plan/529 | **Form 1099-Q** |