



2023 Individual Questionnaire

It is extremely important that you thoroughly complete this questionnaire and return it to us as it is designed to identify potential tax savings and to create a complete and accurate tax return.

SUBMIT YOUR SUPPORTING DOCUMENTS IN ONE OF THE FOLLOWING WAYS:

- Digitally: Upload your information electronically through your secure Onvio Client Portal at [Onvio.com](https://onvio.com)
- Fax: our fax number is 970.223.6509
- Mail/Drop off at: 1044 West Drake Road, Suite 201, Fort Collins, CO 80526
 - We have a drop box upstairs by our office doors
 - The dropbox is available 8am-5pm Monday-Friday

Some of the information we request to prepare your tax return can be found by setting up an **online account with the IRS**. You can do this at irs.gov, click on "Sign in to your account". The IRS is now using ID.me for online accounts. This is explained on the IRS website when you click on "Sign in to your Online Account" on the IRS website. The set up requires you to choose a multi-factor authentication (MFA) option. To verify your identity you will need to either use their self-service process requiring a photo of your government ID and a selfie, or a live phone call with an ID.me agent. Once you set up the online account you can access/view information including: account balance, payment options/history, create a payment plan, get transcripts, and view notices/letters from the IRS.

PLEASE ANSWER EACH QUESTION. If a question is not answered, we will assume it is not applicable to your current situation. If you are unsure, please note your questions in the comments section at the bottom of the page.

Contact Information

(Please complete even if you have provided us the same information in the past)

Taxpayer Name: *

Primary Email: *

Taxpayer Preferred Number:

Please select type of phone:

Cell
Office
Home

Spouse Name:

Spouse Email:

Must be different than primary email for e-sign capabilities

Spouse Preferred Number:

Please select type of phone:

Cell
Office
Home

****For signing your final documents electronically, you must provide different email addresses for the taxpayer and spouse.**

Phone Number for Text Messages:

Do you consent to receive from us text notifications and reminders regarding the preparation of your tax return? We will not send marketing communications via text messaging.

Yes
No

FINAL TAX RETURN

Your final tax return will be available for download once the return has been signed and approved using our secure online signing system, or you ask us otherwise.

Comments:

If you have comments regarding any of the items below, please leave them in the comment section at the bottom of this page.

Are you a new client to our office this year? If so, please provide the information below, if not already provided to us.

Taxpayer Date of Birth:

Taxpayer SSN:

Taxpayer Occupation:

Taxpayer Driver License (DL) #:

Taxpayer DL State of Issue:

Taxpayer DL Issue Date:

Taxpayer DL Expiration Date:

Spouse Date of Birth:

Spouse SSN:

Spouse Occupation:

Spouse Driver License (DL) #:

Spouse DL State of Issue:

Spouse DL Issue Date:

Spouse DL Expiration Date:

Have you provided your prior year FEDERAL and STATE tax returns? If no, please upload your prior year federal and state tax returns to our office through your secure Onvio Client Portal at [Onvio.com](https://onvio.com)

Do you want the IRS to contribute \$3 per taxpayer to the Presidential Campaign Fund? This does not affect your tax liability and does not go to a specific candidate. Yes or No

Did you dispose of any vehicles during 2023 that you used for any business purpose, rental property, job etc. that you deducted on your taxes in the past? If yes, please provide details including sale/disposal date and sale/trade in amount.

Did you receive a First-Time Homebuyer credit on your 2008 tax return, for a property that you still owned in 2023? If yes, please provide a copy of your 2008 tax return.

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

1.1 Did you receive any notices from the IRS or any state tax authority during the past year regarding your taxes that you have not already provided us? If yes, please provide a copy.

1.2 Did you get married or divorced during 2023?

Yes

No

1.3 Did you live and/or work in more than one state and/or country during 2023?

Yes

No

1.3.1 If yes, please provide a summary of where you lived and/or worked in 2023 including dates for each place. Please provide a separate summary for each spouse, if not the same.

1.4 Did you or your spouse pay \$1,000 or more in any quarter, or \$2,600 or more during the year for domestic services performed in or around your home to individuals who could be considered household employees (housekeepers, maids, childcare providers, gardeners, etc.)? This does NOT include individuals who have a business that provides these services to other clients as well.

Yes

No

1.5 Did you earn wages in 2023? If so, include all W-2s.

Yes

No

1.6 At any time during 2023, did you receive (as a reward, award, or payment for property or services) or sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Per the IRS, "digital assets are digital representations of value that are recorded on a cryptographically secured distributed ledger or any similar technology. For example, digital assets include non-fungible tokens (NFTs) and virtual currencies such as cryptocurrencies and stablecoins".

Yes

No

1.6.1 If yes, please provide us with all 2023 virtual currency sale, exchange, or disposition details.

1.7 At any time during 2023, did you hold a foreign (non-US) virtual currency wallet?

Yes

No

I am not sure

1.8 Did you have a FTX trading account in 2023 that lost cryptocurrency or other digital assets after the FTX bankruptcy and Federal indictment of the FTX founder?

Yes

No

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

1.9 Did you pay or receive any alimony in 2023 (do NOT include child support)?

Yes

No

1.9.1 Please specify if you paid or received the alimony.

Paid

Received

1.9.2 How much did you receive or pay?

1.9.3 Recent tax law changes impacted how alimony is treated on an individual tax return. Was your divorce or separation agreement new or modified in 2023? If so, please provide us a copy.

1.10 Did you receive any unemployment compensation in 2023? If so, include Form 1099-G.

1.11 Did you give any gifts over \$17,000 (over \$34,000 if you file married filing joint) per recipient in 2023?

Yes

No

1.11.1 If yes, please describe.

1.12 Did you apply for in 2023 or have you received in prior years an Identity Protection Personal Identification Number (IP PIN) with the IRS?

Yes

No

If so, please provide the Notice CP01A for filing your 2023 federal tax return from the IRS. If you haven't received this notice for your 2023 federal tax return, you can check for this by accessing your IRS online account (see information regarding IRS online accounts at the top of Page 1). If the IRS assigned you an IP PIN for 2023 we cannot file your tax return without your IP PIN.

2.1 Did you have any foreign financial income (NOT including income within a domestic investment account), foreign bank accounts, foreign trusts, or any other foreign financial activity or assets at any time during 2023?

Yes

No

2.1.1 If yes, please describe.

2.2 At any time during 2023, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country?

Yes

No

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

2.3 During 2023, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

Yes

No

2.4 Did you have any other income from any source that you have not provided to us (including cash earnings, tips, bartering, debt forgiveness, gambling winnings etc.)? This should NOT include gifts received.

Yes

No

2.4.1 If yes, please include a summary of these.

2.5 Did you or a family member (taxpayer, spouse, and dependents) enroll in health insurance coverage for 2023 through the Health Insurance Marketplace (Exchange)? If yes, please provide a copy of Form 1095-A. Please contact your health insurance provider if you have not received your form for 2023 by January 31st, 2024.

Yes

No

2.6 Did you pay premiums for a long-term care insurance policy? If so, please provide a copy of your annual bill paid in 2023. You may have to contact your insurance provider for this statement.

Yes

No

2.7 Did you pay any student loan interest in 2023? If so, include all 1098-E forms.

Yes

No

2.8 Did you work in grades K-12 in any of the following roles: teacher, counselor, aide, or principal?

Yes

No

2.8.1 If so, how much did you pay out of pocket for classroom expenses in 2023 that were not reimbursed? This includes amounts paid for PPE, disinfectant, and other supplies for the prevention of the spread of COVID.

2.9 Did you buy or refinance a personal residence in 2023, including a second home? If so, include the purchaser (or borrower) settlement statement.

Yes

No

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

2.10 Did you sell any real estate in 2023, including a principal residence? If so, include the seller settlement statement and any additional selling costs not included on the settlement statement. Also, provide the original purchase date, cost, and a list of any capital improvements made during ownership if we would not have this from prior years.

Yes

No

3.1 Did you incur a casualty (flood, hurricane, tornado, fire, earthquake), disaster, or theft loss in 2023 in a FEDERALLY DECLARED DISASTER AREA? If so, we will follow up with you for the details.

Yes

No

3.2 Did you make any major residential energy improvements to your main home or your vacation/2nd home (does not include rental properties you own) during 2023? These may include, but are not limited to, solar, insulation, windows, doors, water heaters, furnaces, etc.? Please note that the only improvements that are eligible for the tax credit for a vacation/2nd home is the following: Geothermal Heat Pumps, Solar Panels, Solar Water Heaters, and Small Wind Turbines.

Yes

No

3.2.1 If yes, please provide the description and dollar amount for these improvements.

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

3.3 How would you like to receive your refund, if applicable?

Direct Deposit

Mailed Check

Applied to 2024 estimated taxes

Ha, Ha! What refund?

3.3.1 If direct deposit, provide the following (EVEN IF WE ALREADY HAVE IT):

Bank Routing Number:

Maximum of 9 digits

Bank Account Number:

Bank Name:

Is the bank account a checking or savings account?

Checking

Savings

Is the bank account a personal or business account?

Personal

Business

Is the bank account a joint or individual account?

Joint

Individual

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Did you make any estimated tax payments for 2023 (in addition to withholding from your wages)? This includes 4th quarter 2023 estimated tax payments due in January 2024.

Yes

No

If yes, please provide information below regarding your estimated tax payments.

IRS Payments

1st Quarter Amount Paid:

1st Quarter Date Paid:

Month Day Year

2nd Quarter Amount Paid:

2nd Quarter Date Paid:

Month Day Year

3rd Quarter Amount Paid:

3rd Quarter Date Paid:

Month Day Year

4th Quarter Amount Paid:

4th Quarter Date Paid:

Month Day Year

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Estimated Tax Payments Continued:

State Payments

If you made estimated tax payments to more than one state, please provide the information below for each state.

To which state did you pay estimated taxes?

1st Quarter Amount Paid:

1st Quarter Date Paid:

Month Day Year

2nd Quarter Amount Paid:

2nd Quarter Date Paid:

Month Day Year

3rd Quarter Amount Paid:

3rd Quarter Date Paid:

Month Day Year

4th Quarter Amount Paid:

4th Quarter Date Paid:

Month Day Year

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

In 2023, did you have any dependents (including someone who is not your child but whom you supported)?

Yes

No

If yes, please provide information below regarding your dependents. In order to qualify for the child tax credit, other dependent credit, or earned income tax credit, you must complete this information each year.

Do you need to add or remove any dependents for 2023?

Yes

No

If yes, indicate who needs to be removed, or provide the name, DOB, relationship, and SSN of the new ones.

For any dependents between the ages of 19 and 24 in 2023, were they a full-time student (more than 1/2 time) for a part of at least 5 months during the year?

Yes

No

Did your dependent child(ren) live with you more than half of 2023? Temporary absences for school, vacation, or medical care count as time lived with you.

Yes (see a below)

No (see b below)

a. If yes, have you released the dependency claim for 2023 for any of your children to another person (such as the other parent, if you file separately from the other parent)?

Yes

No

If so, please list which of your children you have released the dependency claim for 2023.

b. If no, do you have an active Form 8382 Release/Revocation of Claim to Exemption for Child by Custodial Parent signed by the custodial parent (the parent the child lived with more than half of 2023)? Please provide this to us, as we will need to attach this to the tax return in order to get any tax benefit for this dependent.

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Do you have dependents that must file a tax return? Generally, if any dependent received any income totaling \$13,850 or more, had unearned income (interest, dividends, etc.) in excess of \$1,250 in 2023, or \$400 or more of self-employment income, they need to file a return. Note, if they are not required to file but had federal or state withholding it may still be beneficial for them to file. Let us know if you would like for us to analyze this.

Yes

No

I am not sure

If a dependent's return is necessary, do you want us to file the return?

Yes No

Did you pay for any child care so you and your spouse if married could work, look for work, or attend school, for any child under the age of 13?

Yes

No

If yes, please provide information below regarding your child care. If you paid more than one child care provider in 2023, please provide the following information for each provider.

Name of Business/ Care Provider:

Address:

Tax Identification Number (social security number or federal identification number). If you do not provide this, you cannot take this credit:

Amounts paid to child care provider PER DEPENDENT:

Did anyone attend college, university, vocational school, or other post secondary educational institutions during 2023?

Yes

No

If yes, include all Forms 1098-T provide information below regarding your education.

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Did the student receive scholarships or grants?

Yes

No

If yes, please indicate amounts received (if not provided on Form 1098-T)

Did the student or taxpayers receive any distributions from a qualified tuition program (529 plan, Coverdell, etc.)? If so, please provide Form 1099-Q.

Yes

No

Did you pay for any required course materials (books and supplies) in 2023 that were not reflected on the Form 1098-T? If so, provide a summary of these.

Yes

No

If yes, please indicate the amount that was NOT purchased from that educational institution.

Did you make any contributions to an education savings account in 2023?

Yes

No

If yes, please provide information below regarding your education savings account.

Did you make contributions to any Colorado 529 tuition savings plan? If so, provide the 2023 year-end statement for your Colorado 529 tuition savings plan account(s). Keep in mind the only types of plans that qualify for the Colorado deduction are administered by CollegeInvest, which include: Direct Portfolio College Savings Plan, Scholars Choice College Savings Program, Smart Choice College Savings Plan, and Stable Value Plus College Savings Plan.

Yes

No

If you are not a Colorado resident and you made contributions to a 529 tuition savings plan, please check yes and provide us with your year-end statement.

Yes

No

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Did you have any realized earnings from investment accounts in 2023? This would include interest, dividends, and capital gains.

Yes

No

I am not sure

Did you have any distributions (withdrawals) from retirement accounts, including IRAs, pensions, or receive social security in 2023?

Yes

No

Did you (or will you) make contributions to IRA accounts (NOT including employer retirement plans) for 2023?

Yes

No

If you answered yes to any of the 3 questions above, please provide information below regarding your investment accounts.

Did you have any interest or dividend income? If so, include all 1099-INT, 1099-DIV and 1099 Combined/Consolidated forms.

Yes

No

Did you sell any stocks, bonds or mutual funds (do not include any activity within a 401k, IRAs, or any other tax protected account)? If so, include all 1099-B and 1099 Combined/Consolidated forms.

Yes

No

Did you make any contributions to a Traditional or Roth IRA for 2023? If so, include Form 5498 or provide the contribution amount. Do NOT include amounts contributed in your work retirement account.

Yes (if yes provide contribution amounts below)

No

Amount contributed to Traditional IRA:

Amount contributed to Roth IRA:

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Do you want to make a Traditional and/or Roth IRA contribution prior to filing the 2023 tax return (can be made until 04/15/24 for 2023 tax year)?

Yes (if yes, provide information below)

No

What type of IRA contribution would you like to make?

Traditional

Roth

Amount contributing to Traditional IRA:

Amount contributing to Roth IRA:

Did you receive any retirement plan (401k, IRA, etc.) or annuity distributions (withdrew money from your retirement account)? If so, include all 1099-R forms.

Yes

No

Did you receive any social security benefits? If so, include all 1099-SSA forms.

Yes

No

Did you make any contributions to or withdrawals from your Health Savings Account for 2023?

Yes

No

If yes, please provide information below regarding your Health Savings Account.

Provide the total amount you and/or your spouse contributed or include Form 5498-SA. (Do NOT include contributions made by your employer on your behalf through your payroll) for 2023.

If you made HSA contributions, was the health insurance policy an individual or a family plan?

Individual

Family

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

If you have not yet made the maximum HSA contribution for 2023, do you want to make an additional contribution prior to filing the 2023 tax return (can be made until 4/15/24 for 2023 tax year)?

Yes

No

If yes, how much?

Did you withdraw money from an HSA? If so, include all 1099-SA forms.

Yes

No

If so, were all funds withdrawn used for qualified medical expenses?

Yes

No

Did you make any charitable contributions in 2023?

Yes

No

Did you make any cash charitable contributions (cash, check, or credit card in 2023)?

Yes

No

If yes, provide us with a summary of these contributions. Note, although you do not need to provide us with the receipts, you are required to have a receipt in your records for any cash contribution >\$250.

Did you incur any mileage on your vehicle for charitable purposes in 2023?

Yes

No

If yes, how many miles?

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Did you make any noncash charitable contributions (property, clothing, etc.) in 2023? If so, provide us with the total dollar amount. Note, if the total of all your noncash charitable contributions was greater than \$500, complete the Noncash Charitable Contribution section below.

Yes

No

If your cumulative noncash charitable contributions for 2023 were greater than \$500, specific information regarding each donation is required to be reported on your tax return.

Please provide the details below for your noncash charitable contributions ONLY if the total for 2023 was greater than \$500.

Charity Name:

Charity Address:

Fair Market Value of Items Donated:

Date of Contribution:

Month Day Year

Description of Items Donated:

All taxpayers have the option each year to deduct either actual itemized deductions (mortgage interest, taxes, etc.) or the standard deduction. Due to recent tax law changes, many more taxpayers will benefit from the standard deduction rather than the itemized deductions. We still encourage you to submit all your documents and expenses for the itemized deductions so that we can determine the best deduction for you.

For 2023, the basic standard deduction is \$13,850 (single or married filing separately); \$20,800 (head of household); and \$27,700 (married filing jointly). These amounts apply to individuals under 65 and are higher if you are 65 or older.

If you would like to give us these documents and have us evaluate, answer yes to this question, and please complete the Schedule A (Itemized Deductions) section below.

Do you want to use Schedule A (Itemized Deductions)?

Yes

No

If yes, please provide information below regarding your Schedule A (Itemized Deductions).

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Did you incur any out-of-pocket medical costs (not reimbursed by insurance or HSA withdrawals)?

Yes

No

If so, provide at least an estimate of the total amount paid in 2023. Medical costs are limited as to deductibility, so we can determine from your estimate if we think the medical costs are in excess of IRS limits. If it appears that medical costs may be deductible, we will request more specific information.

Did you incur any mileage on your vehicle for medical purposes during 2023 that you did not reimburse from your HSA account?

Yes

No

If yes, how many miles?

Did you make payments for health or long-term care insurance in 2023 that were not through an employer pre-tax group plan?

Yes

No

If yes, provide the total premium payments, including those for dental, vision, Medigap, COBRA, and/or payments to health sharing organizations such as Medi-Share or Liberty for all taxpayers and dependents.

Does the total above paid for insurance premiums in 2023 include any payments to health sharing organizations such as Medi-Share or Liberty?

Yes

No

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Did you incur mortgage interest on your principal residence or second home? If so, include all 1098 Mortgage Interest statements.

Yes

No

At any time during 2023 was the combined total of all your mortgage balances (first and second home only, not rental or business property) greater than \$750,000? Make sure to include first and second mortgages, as well as home equity loans. If so, your mortgage interest deduction may be limited. Please indicate on the 1098 or in the comments at the bottom of this page the 1/1/23 and 12/31/23 balance on all such mortgages.

Yes

No

Did you have any mortgage on any home with a balance that did not result from the purchase or improvement of the home that is securing that mortgage (in other words, you refinanced and took cash out to pay for education, vacation, purchase of a car, etc.)?

Yes

No

If so, your interest deduction maybe limited. Tell us which mortgage/home this applies to, and your tax preparer will tell you what additional details we need.

Is the fair market value of your home less than the combined total of all mortgage balances on that home?

Yes

No

Did you pay property taxes for any real estate?

Yes

No

If so, provide amount paid in 2023 (unless already included on 1098 mortgage interest statement).

Did you purchase a vehicle, boat or any other large item, other than real estate?

Yes

No

If so, include the purchase statement or indicate the amount of sales tax you paid in 2023.

Did you include your auto registration paid in 2023? Please note the deductible portion is not equal to the total registration expense that you paid. Please provide us with the tax and fees receipt that was included with your registration.

Yes

No

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Did you purchase rental property during 2023?

If yes, please provide the following information regarding your rental property. If you purchase more than one property, please fill out this page separately for each property.

Please provide copies of the purchase closing statement of any real property purchased in 2023. Also, provide copies of any refinancing settlement statements if you refinanced the property after purchase.

New Property Address:

NOTE: There are certain items included in a real property purchase that can be depreciated over a shorter period of time than the building. Although this step is **OPTIONAL**, by identifying the value at purchase of these items we can maximize the current year tax deductions for your property. Please provide the **value at purchase** of the following items included in the original purchase of the real property purchased:

Refrigerator:

Stove:

Oven:

Dishwasher:

Microwave:

Washer:

Dryer:

Flooring - Tacked Down Carpet:

Window Coverings:

Hot Water Heater:

Furnace:

Air Conditioner:

Roof:

Landscaping:

Other (please describe):

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Did you own any rental property that is not reported on a separate tax return (please do not include details that you already provided for a separate LLC or partnership tax return)?

Yes

No

If yes, please provide information below regarding your rental properties.

Do not complete this section if you have already provided these details to us in accounting software, on a separate spreadsheet, or other documentation.

Please provide any 1099s and 1098s received and any settlement statements for purchases/refinances/sales that occurred in 2023.

Did you make any payments in 2023 that would require you to file 1099 Form(s), (1099-NEC, MISC, 1099-INT, etc.)? If you are unsure of the 1099 requirements, please contact us, as IRS fines can be substantial.

Yes

No

I do not know

If so, did you file all required 1099 Form(s) for 2023?

Yes

No

If you have more than one rental property, please fill out the rental pages separately for each property.

Property Address:

2023 Total Rent Received:

2023 Advertising Paid:

2023 Cleaning & Maintenance Expenses Paid:

2023 Property Insurance Costs Paid:

2023 Management Fees Paid:

2023 Mortgage Interest Paid:

2023 Repairs Paid:

2023 Property Taxes Paid:

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Rental Property Information Continued:

2023 Utility Costs Paid (Electric, Gas, Water, Sewer, Trash):

2023 HOA Fees Paid:

2023 Security Deposits Received (if not included in rent received amount):

2023 Security Deposits Returned:

2023 Other Expenses Paid (please describe):

2023 Capital Improvements and/or Appliances (include description, date in service, and amount):

Total number of 2023 personal use days including days rented to family/friends below market rates (do not include repair days):

Total number of 2023 repair days (any day you spent working substantially full time repairing and maintaining the rental property):

Total number of days rented in 2023:

How is this property owned (individually, joint tenancy, partnership, single-member LLC, multimember LLC, or other)?

Did you incur any mileage on your vehicle while operating your rental property? Yes or No
If yes, please complete the Business Vehicle information.

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Were you self-employed, or did you own a business that does NOT file a separate income tax return? If your business files a separate income tax return (such as Form 1120S or 1065), answer No to this question. If your business files its income tax details on a Schedule C on your personal return, answer Yes and fill out this section.

Yes

No

If yes, please provide information below regarding your business.

Provide to us an accountant's copy of your QuickBooks file with a 01/01/2024 dividing date or a summary of your income and expenses for the year. If you use QuickBooks Online, please let us know when you have recorded all 2023 activity and have bank, credit card, and loan accounts reconciled.

Are you the only owner of your business?

Yes

No

I don't know

Did the business purchase any fixed assets in 2023?

Yes

No

If yes, please provide details including description, purchase date, and purchase amounts (if not already detailed in your books).

Does the business have a retirement plan (401(k), SEP, Simple IRA, etc.)?

Yes

No

Retirement Plan - If yes, has the owner made any current year contributions on behalf of him/herself?

Yes

No

If yes, how much?

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Business Information Continued:

Retirement Plan - If yes, will there be any additional contributions for 2023 before the tax return is filed?

Yes

No

If yes, how much? Please note below if you need our help in determining the maximum allowed contribution.

Retirement Plan - If no, does the business owner want to make a contribution for 2023 or create a plan before the tax return is filed?

Yes

No

If yes, how much? Please note below if you need our help in determining the maximum allowed contribution.

Did the business receive any income that has not been recorded in the books or in the summary that you provided (example: tips, cash sales, etc.)?

Yes

No

If yes, please include a summary of these.

Did the business owner use personal funds to pay for any business items in 2023 that are not recorded in your books?

Yes

No

If yes, please include a summary of these.

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Business Information Continued:

1.8 During 2023, did the business owner have self-employed health insurance for the owner and/or owner's family? Self-employed health insurance includes premiums paid by your business or from personal funds. Based on proposed regulations this DOES include payments to health sharing organizations such as Medi-Share or Liberty. It DOES NOT include any payments made through other employers' plans.

Yes

No

1.8.1 If yes, at any time during 2023 was the business owner or his/her spouse eligible for group health insurance through another employer?

Yes

No

1.8.2 If no, please provide the total insurance premiums paid in 2023 for the business owner and family (if not already detailed separately in your books). This could include long-term care, dental, vision, Medigap, COBRA, and/or payments to health sharing organizations such as Medi-Share or Liberty.

1.8.3 Does the total above (or in your books) paid for insurance premiums in 2023 for the business owner and family include any payments to health sharing ministries such as Medi-Share or Liberty?

Yes

No

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Business Information Continued:

Did the business have any foreign income, foreign bank accounts, foreign trusts, or any other foreign financial activity or assets at any time during 2023?

Yes

No

Did the business make any payments to foreign individuals or foreign entities for services that foreign individual or foreign entity performed in the US during 2023?

Yes

No

At any time during calendar year 2023, did the business have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?

Yes

No

At any time during calendar year 2023, did the business hold a foreign (non-US) virtual currency wallet?

Yes

No

I am not sure

Did the business have income earned in any state other than the business's home state in 2023? If yes, please describe (identify states). Please note that physical presence (where the sale takes place or the work is performed) determines which state the income is earned in and whether a tax return for that state is required.

Yes

No

If yes, please describe (identify states).

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Business Information Continued:

Did the business have employees located in any state other than the business's home state in 2023?

If yes, please describe (identify states).

Yes

No

If yes, please describe (identify states).

Did the business make any payments in 2023 that would require it to file 1099 Form(s) (1099-NEC, 1099-MISC, 1099-INT, etc.)? If you are unsure of 1099 filing requirements, please contact us, as IRS fines can be substantial.

Yes

No

I do not know

If yes, did the business file all required 1099 Form(s) for 2023?

Yes

No

Did you use a vehicle in the business? If so, please complete the Business Vehicle Information below.

Yes

No

Did you use a qualified home office in this business? If so, please complete the Home Office Information below.

Yes

No

Business Vehicle Information:

Did you use a vehicle for business purposes in 2023? Answer no if you used your vehicle for your job with a W-2 employer/business that you do not own. Also answer no if your business files a separate income tax return (such as Form 1120S or 1065).

Yes

No

If yes, please provide the following information regarding your business vehicle(s). If you have more than one business vehicle, please fill out a separate page for each vehicle.

The IRS is enforcing more stringently their requirements for detailed mileage records that support business use of vehicles. It is the responsibility of the business owner to have these records available upon the request of the IRS. While we do not require that you provide us with these detailed records, it is imperative that you have them. If you use unsubstantiated estimates, you run the risk of the deduction being disallowed. Please summarize your actual business vehicle use below:

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Business Vehicle Information Continued:

Do you have documentation for the mileage provided below?

Yes

No

If so, is it written?

Yes

No

Year:

Make:

Model:

Date in service (if first used for business purposes in 2023):

Number of TOTAL miles (business and personal combined) for January 01, 2023 - December 31, 2023:

Number of BUSINESS miles for January 01, 2023 - December 31, 2023:

Number of RENTAL miles for January 01, 2023 - December 31, 2023:

If this vehicle is NOT deducted using the standard mileage rate, provide a summary below of actual 2023 expenses (gas, lease payments, insurance, registration/license, repairs/maintenance, etc.) IF NOT ALREADY IN YOUR BOOKS.

Did you dispose of any vehicles during 2023 that you used for any business purposes, rental property, job, etc. that you deducted on your taxes in the past?

Yes

No

If yes, provide details including sale/disposal date and sale amount.

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Business Information Continued:

Home Office Information:

Do you have a home office? Answer no to the following question if your home office is for your job with a W-2 employer/business that you do not own. Also answer no if your business files a separate income tax return (such as Form 1120S or 1065).

Yes

No

If yes, please provide the information below regarding your home office.

If the taxpayer or spouse has a qualified home office, please complete the following (include the total amount of each expense; we will calculate the home office portion). If you do not know what qualifies, please ask us.

Square footage of the space used solely for business:

Total square footage of your home:

Is this a new home office in 2023?

If yes, what is the purchase price of home?

If yes, what is the cost of major improvements:

If yes, what is the date home office first used:

If you would prefer to use the IRS standard home office deduction of \$5/square foot (maximum of \$1,500), please indicate below and do not complete the remainder of this addendum.

I want to use the standard home office deduction

Yes

No

2023 Mortgage Interest Paid:

2023 Property Taxes Paid:

2023 Rent Paid (if you do not own the home):

2023 Utilities Paid (Electric, Gas, Water, Sewer, Trash):

2023 Property Insurance Costs Paid:

Comments:

If you have comments regarding any of the questions below, please leave them in the comments section at the bottom of this page.

Home Office Information Continued:

2023 Maintenance Expenses Paid:

2023 Repairs Paid:

2023 HOA Fees Paid:

2023 Capital Improvements and/or Appliances (include description, date in service, and amount):

2023 Other Home Expenses (please describe):