

# 2023 TAX CHECKLIST & QUESTIONNAIRE

Please check here if all names, SSN, DOB, etc. (all shaded areas) stayed the same in 2023.

Name:	SSN:	DOB:	Occupation:
Primary Taxpayer:			
Secondary Taxpayer:			
Current Mailing Address:	Phone:	Cell Phone:	Other:
	Primary Email Address:		
	Secondary Email Address:		

**Proof of identity is required such as a driver's license or state-issued photo ID to e-file.**

Expected Filing Status for 2023:	Other Information:	Primary:	Secondary:
<input type="checkbox"/> Single (S)	Are you blind or disabled?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Married Filing Jointly (MFJ)	Are you a full-time student?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Married Filing Separately (MFS)	\$3 Election campaign fund?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Qualifying Surviving Spouse (QSS)	Did you file taxes in 2023?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Head of Household (HOH)			

Did your marital status change due to divorce, separation, death of a spouse, etc. in 2023?  Yes

Can you or your spouse be claimed as a dependent on someone else's tax return?  Yes

If so, have you or your spouse been claimed as a dependent on someone else's tax return?  Yes

Did you move or did your address change during the year?  Yes

Were you, your spouse, or any dependents ever a victim of identity theft?  Yes

Were you, your spouse, or any dependents ever issued an Identity Protection PIN (IP PIN)?  Yes

***If "Yes," provide Notice CP01A from the IRS for each party affected.***

## DEPENDENT / QUALIFIED CHILDREN:

Name:	SSN:	Birthdate:	Age:	Relationship:	Mos. In Home:	College Student:	Dependent's Gross Income:
						Yes	
						Yes	
						Yes	

If you alternate claiming a non-custodial child every-other-year on your tax return, do you have a **IRS Form 8332 – Release of Claim of Exemption of Child by Custodial Parent** signed and on file.  Yes

Can another person **QUALIFY** to claim any of your dependents in 2023?  Yes

Did you pay any qualified childcare expenses to a licensed daycare provider during 2023?  Yes

Did you provide over half the support for any other person during 2023?  Yes

Do you have any dependent children who must file a 2023 Federal or State tax return?  Yes

***As a courtesy, dependent children's tax returns are prepared free of charge.***

Do you want your refund direct deposited into a checking or savings account?  Yes

***If "Yes", please provide VOIDED CHECK or deposit slip.***



**TAXABLE INCOME: (Please check “✓” all that apply)**

- Wages, salary, tips, etc. (W-2s)
- Disability income (W-2)
- Tips not reported on W-2s
- Lyft, Uber, Airbnb, VRBO, etc. (1099-K or NEC)
- Taxable Interest (1099-INT, Bank Statements)
- Dividend income (1099-DIV)
- IRA withdrawals, rollover, or transfer (1099-R)
- Pension income (1099-R)
- Annuity income, payments, or transfer (1099-R)
- Social Security Benefits (1099-SSA)
- Cancellation of debts (1099-C)
- Non-Employee Compensation (1099-NEC)
- Home or real estate sale (1099-S)
- Foreign income or taxable investments
- Maintain foreign accounts or transactions
- Business or hobby income / loss (Schedule C)
- Gains on investments, land, etc. (1099-COMP)
- Rental income property (Schedule E)
- Partnership income (K-1)
- Estate or trustee income (K-1)
- Unemployment Compensation (1099-G)
- Gambling / lottery winnings (W-2G)
- Distributions from education accounts (1099-Q)
- Jury Duty income
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

Did you sell, exchange, mine, or otherwise dispose of any digital asset (Crypto – Digital Currency) in 2023?  Yes

**ADJUSTMENTS TO INCOME / Tax: (Please check “✓” yes to all that apply)**

- Did you incur any expense as a direct result of teaching (Educator Expense Deduction)?  Yes
- Did you own a Health Savings Account (1099-SA) individually or through work?  Yes
- Did you move as a member of the Armed Forces in 2023 (Moving Expense Deduction)?  Yes
- Did you contribute to a SEP, SIMPLE or other self-employed qualified plan in 2023?  Yes
- Did you withdraw funds from an IRA, 401(k), etc. prior to 59½ (Early Withdrawal Penalty)?  Yes
- Did you contribute to an Individual Retirement Account (IRA) or Roth IRA in 2023?  Yes

If “Yes”, amount contributed: Taxpayer: \_\_\_\_\_ 2<sup>nd</sup> Taxpayer: \_\_\_\_\_

- Did you pay interest on a student loan (Student Loan Interest Deduction)?  Yes
- Did you receive a Health Insurance Marketplace Statement (1095-A) in 2023?  Yes
- Did you pay estimated taxes in 2023?  Yes

If yes, amount paid: 1<sup>st</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_ 3<sup>rd</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_  
2<sup>nd</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_ 4<sup>th</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_

- Did you make a Qualified Charitable Distribution (QCD) in 2023?  Yes

If yes, amount of QCD: \_\_\_\_\_ From which financial institution did the QCD occur? \_\_\_\_\_

**ITEMIZED TAX DEDUCTIONS: (Please check “✓” all that apply)**

*Please note, the standard deduction for 2023 is \$13,850 for single filers and \$27,700 for joint filers under age 65.*

- Medical and Dental Expenses (> 7.5% AGI) \_\_\_\_\_
- Health Insurance / Medicare \_\_\_\_\_
- Long-Term Care Insurance \_\_\_\_\_
- State and Local Taxes \_\_\_\_\_
- New Motor Vehicle or Boat Sale Tax \_\_\_\_\_
- Real Estate Property Taxes \_\_\_\_\_
- Home Mortgage Interest / Points Paid \_\_\_\_\_
- Mortgage Insurance \_\_\_\_\_
- Donations to Charity (Documented) \_\_\_\_\_
- Casualty or Theft Losses \_\_\_\_\_
- Other: \_\_\_\_\_

Did you itemize your tax deductions last year?  Yes  No

**TAX CREDITS & MISC.: (Please check “✓” yes to all that apply)**

- Did you install a geothermal, solar, or wind energy system to your primary residence in 2023?  Yes
- Did you make energy efficiency improvements to your primary residence in 2023?  Yes  
If so, please list the amount of energy credits used (if any) prior to 2023? \$ \_\_\_\_\_
- Did you adopt a child in 2023 or have adoption credit carried over from 2022?  Yes
- Did you pay education tuition and fees for you, your spouse or dependent child in 2023?  Yes  
If so, please provide your Tuition Statement (**1099-T**), receipts for books, etc.
- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?  Yes
- Did you pay any foreign income or investment tax?  Yes
- Did you contribute to a 401(k), 403(b), Simple IRA or other company retirement plan in 2023?  Yes

**WI STATE RETURN: (Please check “✓” yes to all that apply)**

- Did you purchase / renew a Wisconsin special tax-deductible license plate in 2023?  Yes
- Did you purchase (through internet, etc.) items where Wisconsin sales tax is due but not paid?  Yes
- Did you work in or receive income from another state other than Wisconsin?  Yes
- Did you pay state income tax to another state other than Wisconsin in 2023?  Yes
- Did you pay rent in 2022?  Yes  
Was heat included?  Yes  No (Heat not included)
- Did you pay Wisconsin state property tax for anyone other than yourself?  Yes
- Did you receive the Wisconsin Homestead Credit in 2022 or expect to receive the credit in 2023?  Yes
- Did you pay Medicare Supplement, MedAdv, Long-Term Care, Prescription Drug premiums in 2023?  Yes
- Did you pay in-state college tuition for yourself or a dependent in 2023?  Yes
- Did you contribute to Wisconsin’s 529 College Savings Program (Tomorrow’s Scholar or EdVest in 2023)?  Yes
- Did you pay private K-12 tuition for a dependent child in 2023?  Yes

**OTHER: (Please check “✓” yes to all that apply)**

- Were you ever audited or received any correspondence by the IRS?  Yes
- Were you ever delinquent in paying your taxes or ever modified your tax return after it was filed?  Yes
- Did you or your spouse make or receive gifts of over \$17,000 in 2023?  Yes
- Did you turn 73 prior to December 31st of 2023 (RMD)?  Yes

**2024 TAX PLANNING: (Please check “✓” yes to all that apply)**

- Do you expect your income, withholdings or other financial to change in 2024?  Yes
- Will you file bankruptcy, have any lender forgive / cancel debts (credit cards, etc.) in 2024?  Yes
- Do you and / or your spouse plan to retire or have significant life / income changes in 2024?  Yes
- Do you expect to undergo any major-medical expenses in 2024?  Yes
- Do you expect to file bankruptcy, foreclose, or have any debt forgiven or cancelled in 2024?  Yes
- Will any dependent children turn 17 and NOT be entering college or vocational school in 2024?  Yes
- Will you turn 73 prior to December 31st of 2024? (RMD)  Yes

Notes: \_\_\_\_\_

**REQUIRED DOCUMENTATION NEEDED TO COMPLETE YOUR TAX RETURNS:**

- \_\_\_\_\_  \_\_\_\_\_
- \_\_\_\_\_  \_\_\_\_\_