**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:** | **Primary 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:** |
| ❑ Single (S)  ❑ Married Filing Jointly (MFJ)  ❑ Married Filing Separately (MFS)  ❑ Qualifying Surviving Spouse (QSS)  ❑ Head of Household (HOH) | Are you blind or disabled? ❑ Yes ❑ Yes  Are you a full-time student? ❑ Yes ❑ Yes  $3 Election campaign fund? ❑ Yes ❑ Yes  Did you file taxes in 2023? ❑ Yes ❑ Yes |

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 ❑ Yes

***IRS Form 8332 – Release of Claim of Exemption*** ***of Child by Custodial Parent*** signed and on file.

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)**

❑ **Sale or mining of any crypto or virtual currency**

❑ 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 property income **(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:

**ADJUSTMENTS TO INCOME / Tax: (Please check “✓” yes or no to each question)**

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:******2nd 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: **1st Quarter:** Fed: \_\_\_\_\_\_\_ St: \_\_\_\_\_\_\_ **3rd Quarter:** Fed: \_\_\_\_\_\_ St: \_\_\_\_\_\_\_

**2nd Quarter:** Fed: \_\_\_\_\_\_\_ St: \_\_\_\_\_\_\_ **4th 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 or no to each question)**

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 ❑ Yes

located in a foreign country?

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 or no to each question)**

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, 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 or no to each question)**

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 $16,000 in 2023? ❑ Yes

Did you turn 73 prior to December 31st of 2023 (RMD)? ❑ Yes

**2024 TAX PLANNING: (Please check “✓” yes or no to each question)**

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:**

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❑ ❑