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**2022 Tax Season Update Questionnaire**

Client Name: Date

***We provide one copy of your tax return per year.***

***Please select one: Paper \_\_\_\_\_\_\_\_\_ Portal (Onvio) \_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

* *New York State requires a “wet” signature or Onvio e-signature. No copies or scans of signatures will be accepted.*
* *If you opt for a digital or e-mail copy you will not receive a paper copy of your returns and it is your responsibility to print and save your tax returns. Additional copies will be $25 per request.*
* We need ***two different e-mails*** on file if you are filing a joint tax return and select the Onvio portal.

**Please circle if any of the following changed so we can provide you with a different questionnaire:**

Address E-mail Cell Phone Home Phone

**Marital Status Change**: Please Provide Marriage Certificate, Divorce Decree and/or new Social Security Card for name change if applicable.

* **New Dependent** (s): Please provide copies of social security card & birth certificate.
* **If you bought, sold or refinanced your real estate property:** provide a copy of your closing statement.

*\*Please note that we cannot file your returns without the before mentioned documents if these life changes took place.*

Did you have healthcare for all of 2022? **Yes No**

If yes, was it provided through the Affordable Care Act? **Yes No**  *If yes, Form 1095-A is required to complete your tax return.*

*or*

If yes, was it provided through Employer Medicare/Medicaid Self-insured

**Change to Bank Account for direct deposit/debit**: Please provide a copy of a voided, blank check. ***Do not provide a deposit slip!***

**2022 Tax Season Update Questionnaire**

 **Yes No**

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1. **At any time in 2022 did you (a) receive (as an award, reward, or payment of property or service) or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)?**

**Digital assets include convertible virtual currency, cryptocurrency, stablecoins, NFTs.**

1. **Did you or anyone in your household work outside of your home state?**

*If yes, need copies of driver’s license for* ***taxpayer and spouse****, (if married).*

1. **Did you make any contributions to, or withdrawals from, a Health Savings Account or Archer MSA in 2022?**
2. **Did you make out-of-state purchases by telephone, internet, mail or in person *without paying sales tax?***
3. **Did you make gifts of more than $16,000 to any individual(s)? (This could be multiple gifts totaling to $16,000.00 in one year.)**
4. **Did you receive correspondence from the State or the IRS?**

*If so, please provide copies of all such notices if you haven’t done so already.*

1. **Did you receive notification *that the IRS reduced or disallowed a credit in the previous* years?**

*If so, please provide a copy of the letter.*

1. **Did you receive an IRS PIN for your 2022 tax return?**

*If so, please provide a copy of the letter.*

1. **Did you or anyone in your household receive unemployment benefits**

*If yes, you* **must** *login to your unemployment account for the Form 1099-G; it will* **not** *be mailed to you.*

1. **Did you or anyone in your household have more than one job?**

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1. ***Did anyone in your family receive a scholarship of any kind during the year 2022?***
2. ***Did you make any contributions to a 529 Plan or a withdrawal from a 529 Plan?***
3. ***Did you, your spouse, or dependents attend a post-secondary school during the year, or plan to attend one in the coming year?***
4. **Did you have education expenses during the year on behalf of yourself, your spouse or a dependent?**
5. **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?**
6. **Were you a victim of a Federal declared disaster such as a hurricane, tropical storm, flooding, wildfire or tornado?**
7. **Do you and/or spouse start a business in 2022? If yes, business name(s)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**If yes, please circle business entity so we can provide a business questionnaire.**

 **Entity: Sole Proprietor Single Member LLC Partnership Corporation Non-profit**

1. **Comments:**