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**2023 Tax Season Update Questionnaire**

Client Name: Date:

**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 above-mentioned documents if these life changes took place.*

Did you have healthcare for all of 2023? **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.*

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!***

 **Yes No**

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1. **At any time in 2023 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 2023?**

**2023 Tax Season Update Questionnaire**

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**Yes No**

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1. **Did you make out-of-state purchases by telephone, internet, mail or in person *without paying sales tax?***
2. **Did you make gifts of more than $17,000 to any individual(s)? (This could be multiple gifts totaling to $17,000.00 in one year.)**
3. **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 2023 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?**
2. **Did anyone in your family receive a scholarship of any kind during the year 2023?**
3. **Did you make any contributions to a 529 Plan or a withdrawal from a 529 Plan?**
4. **Did you, your spouse, or dependents attend a post-secondary school during the year, or plan to attend one in the coming year?**
5. **Did you have education expenses during the year on behalf of yourself, your spouse or a dependent?**
6. **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?**

**2023 Tax Season Update Questionnaire**

**Yes No\_\_**

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1. **Were you a victim of a Federal declared disaster such as a hurricane, tropical storm, flooding, wildfire, or tornado?**
2. **Did you purchase a new or previously owned clean vehicle this year that is eligible for the new clean vehicle credit? If yes, attach the vehicle statement from the dealer.**

**NEW: Corporate Transparency Act (CTA)/Beneficial Ownership Information (BOI)**

1. **Did any household member start a business in 2023? If yes, business entity/type\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
2. **Did any household member start a business in 2024? If yes, business entity/type\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
3. **Is any household member a member of *an active or inactive* LLC? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
4. **Are you an owner or do you control 25% of a company’s ownership interest for a company registered with a secretary of**

**state or similar office before January 1, 2024?**

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

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| **Paper:** | yes\_\_\_\_\_\_ | no\_\_\_\_\_\_\_ |
| **Portal(Onvio):** | yes\_\_\_\_\_\_ | no\_\_\_\_\_\_\_ |
| **Email:** | yes\_\_\_\_\_\_ | no\_\_\_\_\_\_\_ |

***Please check one:***

* *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.
1. **Comments:**

***Any omission or missing information may result in inaccuracies in your tax returns, for which we cannot be held responsible.***