

## Questionnaire

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

### Questionnaire

#### Personal Information

- | Yes                      | No                       | If "Yes," provide details.  |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year?<br>If "Yes," explain. _____   |
| <input type="checkbox"/> | <input type="checkbox"/> | If your filing status is married, but you are filing separately from your spouse, did you and your spouse live apart for the last six months of 2023? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your name change during the tax year?<br>If "Yes," explain. _____   |
| <input type="checkbox"/> | <input type="checkbox"/> | Can you or your spouse be claimed as a dependent by someone else?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you, your spouse, or any dependents a victim of identity theft?<br>If "Yes," explain. _____  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?<br>If "Yes," provide Notice CP01A from the IRS.                  |

#### Personal Income

- | Yes                      | No                       | If "Yes," provide details.  |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash in any U.S. savings bonds during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds, or other investments during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any tips not reported to your employer?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any principal or interest during this year from property sold in prior years?                           |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any other income you have not provided information for with this organizer?<br>If "Yes," explain. _____ |

#### Purchases, Sales, and Debt Information

- | Yes                      | No                       | If "Yes," provide details.   |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell a principal residence during the year?<br>If "Yes," provide closing documentation for the purchase and sale of the home.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a principal residence or a piece of real property foreclosed on during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you abandon a principal residence or a piece of real property during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you refinance your principal home or second home or take out a home equity loan during the year?<br>If "Yes," provide all escrow, closing, and other pertinent documentation and information.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell, exchange, or purchase any real estate during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts canceled or forgiven this year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new or previously owned clean vehicle (electric vehicle, plug-in hybrid, fuel-cell vehicle, qualified commercial clean vehicle) during the year? If "Yes," provide the report the seller is required to provide to you. |

#### Retirement Information

- | Yes                      | No                       | If "Yes," provide details.  |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any contributions (NOT THROUGH AN EMPLOYER) to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?                               |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any withdrawals or receive distributions from a pension or profit-sharing plan, IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any Social Security benefits during the year?   |

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#### Health Care Information

- | Yes                      | No                       | If "Yes," provide details.   |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did any member of your household have healthcare coverage through the Marketplace (Obamacare, MNSURE)?<br>If "Yes," provide copies of Form 1095-A.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?<br>If "Yes," provide copies of Form 1099-SA and Form 5498-SA |
|                          | <input type="checkbox"/> | Individual Health Savings Plan   |
|                          | <input type="checkbox"/> | Family Health Savings Plan   |
| <input type="checkbox"/> | <input type="checkbox"/> | Were all your HSA distributions used for medical expenses?   |

#### Business Income

- | Yes                      | No                       | If "Yes," provide details.  |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you rent out your home or use it for business?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you acquire a new or additional interest in a partnership or S corporation?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any business assets or convert any assets to business use?<br>If "Yes," provide the cost of the asset, the date it was placed in service, and the business use percentage. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell an existing business, rental property, or other property during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any gasoline, diesel, or special fuels for off-road business use?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive income or incur expenses associated with:<br>If "Yes" provide documentation. (1099-MISC, 1099-K, 1099-NEC)  |
|                          | <input type="checkbox"/> | A fantasy sports league?<br>If "Yes," provide documentation.  |
|                          | <input type="checkbox"/> | Freelancing (e.g., Upwork or TaskRabbit)?   |
|                          | <input type="checkbox"/> | Car sharing (e.g., Lyft or Uber)?   |
|                          | <input type="checkbox"/> | Crowdfunding (e.g., Kickstarter or Indiegogo)?  |
|                          | <input type="checkbox"/> | A short-term rental (e.g., Airbnb, VRBO or HomeAway)?   |
|                          | <input type="checkbox"/> | As an independent contractor (e.g., Shipt, Instacart, DoorDash)?  |
|                          | <input type="checkbox"/> | Fashion sharing (e.g., Poshmark or thredUP)?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you a business owner who paid health insurance premiums for your employees during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a new business or purchase any rental property during the year?   |

#### Refund, Withholding, and Estimated Tax Information

- | Yes                      | No                       | If "Yes," provide details.  |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | If you have an overpayment of 2023 taxes, do you want the refund applied to your 2024 estimated taxes?        |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any estimated payments toward your 2023 taxes? (not withheld from your paycheck)                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want any balance due directly withdrawn on April 15th 2024?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to have any refunds directly deposited?<br>If "Yes," provide a canceled checking or savings slip. |

#### Education Information

- | Yes                      | No                       | If "Yes," provide details.   |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did anyone in your household attend a post-secondary school during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay student loan interest for yourself, your spouse, or your dependents during the year?<br>If "Yes," provide the amount of interest that was refunded.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive forgiveness on a qualifying federal student loan?  |

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#### Dependent Information (if you are not claiming any dependents skip this section)

**Yes No If "Yes," provide details.**

- Did you have any changes in dependents during the year?  
If "Yes," explain. \_\_\_\_\_
- Can another person qualify to claim any of your dependents?
- Did you have any child or dependent care expenses during the year?
- Did you have any adoption expenses during the year?  
  If so was it considered a special needs adoption by the agency?
- Did you have any children under age 19 or a full-time student under age 24 with more than \$2,500 of unearned income?

#### Provide documentation for proof of dependent credits (school records, medical records, daycare records, etc.)

- Are you unmarried and support a household for qualifying person?  
  Do you pay for half the cost of the home?  
  Are you divorced?  
If "yes" do you have a divorce decree of separate maintenance agreement?  
(circle one)
- Do you have custody of your dependents?  
How many nights did each dependent sleep in your house?  
\_\_\_\_\_

- Do you receive any nontaxable support income? (family, food stamps, housing assistance, child support, ect)

- Does any non dependent live in your home? (adult)

Name and Relationship: \_\_\_\_\_

- Do they provide financial support?

#### Foreign Tax Information

**Yes No If "Yes," provide details.**

- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
- Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
- Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?
- Did you have any income from, or pay taxes to, a foreign country?
- Did you receive a Schedule K-3 from a partnership or S corporation?
- Did you have ownership in a foreign corporation at any time during the year?
- Did you own property in a foreign country?

#### Miscellaneous Information

**Yes No If "Yes," provide details.**

- Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset?
- Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
- Did you make gifts to any one person in excess of \$17,000 during the year?  
**Yes No**  
  If "Yes," are you splitting the gift with your spouse?
- Did you incur moving expenses with the military during the year?
- Did you make any energy-efficient improvements to your main home during the year?
- Did you receive any notices from the IRS or state taxing authority?  
If "Yes," provide documentation.
- May the IRS discuss your tax return with your preparer? (this answer is yes)

#### Minnesota Specific Information

Questionnaire

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Questionnaire

Yes No If "Yes," provide details.

[ ] [ ] In 2023, did you contribute to a 529 College Education Plan? If yes, provide details.

[ ] [ ] Do you want to contribute to the MN Wildlife Fund?

If "yes" how much? \$ \_\_\_\_\_

[ ] [ ] Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?

[ ] [ ] Did you receive the MN Walz refund of \$260?

How much did you get \$ \_\_\_\_\_

In order to determine if you qualify for a Renter's Credit or Homestead Rebate/Property Tax Refund, please answer the following questions:

Yes No

[ ] [ ] Do you or your spouse contribute to a flex spending account? (daycare/medical)

If yes, what is your annual contribution? \$ \_\_\_\_\_

[ ] [ ] Does anyone in your household receive non-taxable income or financial assistance? If yes, indicate amount and type.

If yes, Amount and Type? \$ \_\_\_\_\_

[ ] [ ] Homeowners: Does anyone have income that lives in your household that is not on your tax return? If yes, please provide a copy of their 2023 Tax Return.

Questions.

Series of horizontal lines for handwritten answers.