



I appreciate the opportunity to prepare your 2023 income taxes. In order to better serve my clients, and minimize any chances of missing taxable items or deductions, I'm requiring that this questionnaire be completed in full. Please complete the information on this form and include it with your tax return information. Also include a copy of your 2022 Return.

Taxpayer's Full Name: _____

Spouse's Full Name: _____

Current Address: _____

Home Phone Number: _____ Best time to call: _____

Taxpayer's Cell: _____ Spouse's Cell: _____

Cell Phone Number(s): _____

Best Contact Email Address: _____

Taxpayer's Birthdate _____ Spouse's Birthdate _____

Taxpayer's Occupation _____ Spouse's Occupation _____

Please list any dependants here, including their name, birthdate, relationship to you and SSN:

For security, speed, and tracking purposes I HIGHLY recommend direct deposit/withdrawal for any refunds or amounts due.

Banking Information:

Bank Name: _____ Checking or Savings account (circle one)

Routing Number: _____

Account Number: _____

* Please attach a voided check to this sheet *

By signing below, I acknowledge that the answers and information I am supplying to ML Accounting for the preparation of my individual tax return are true and correct to the best of my knowledge. I have not received any additional taxable income that I am not including in these work papers. I agree to have my refunds deposited, or tax due withdrawn, from the account listed above.

Taxpayer Signature / Date

Taxpayer Signature / Date

For any questions on the back side of this form that you select "Yes", please include supporting documentation with your tax information.

AREA RESERVED FOR ID VERIFICATION (Please bring your license or State photo ID with you)

During 2023 did you (or your spouse):

| | | | |
|---|-----|--|----|
| Get married, separated, or divorced? | YES | | NO |
| Have a baby or adopt a child? | YES | | NO |
| Change jobs? | YES | | NO |
| Do you have a parent that you provide more than half of their support? | YES | | NO |
| Pay any post-high school tuition for your dependant? | YES | | NO |
| Pay tuition for your child(ren) to attend a private K-12 school? | YES | | NO |
| Buy or sell a home? | YES | | NO |
| Pay rent for your place of residence? If YES, total paid for 2023: _____ | YES | | NO |
| If you paid rent, was heat included in your rent? | YES | | NO |
| Have you given cash, goods or property worth \$17,000 or more to any individual or Trust in 2023? | YES | | NO |
| Pay any mortgage interest on your primary or secondary residence? | YES | | NO |
| Pay interest on a home equity loan used to buy, build or improve your home? | YES | | NO |
| Pay any property taxes (even if you are unable to itemize)? | YES | | NO |
| Pay interest on a school loan? | YES | | NO |
| Take any college or technical school classes? | YES | | NO |
| Pay any daycare expenses for your dependant(s)? | YES | | NO |
| Have a Dependant Care Flex Spending Account through your employer? | YES | | NO |
| Make any cash contributions to a non-profit business or church? | YES | | NO |
| Donate any non-cash items to St. Vincent De Paul, Goodwill, etc.? | YES | | NO |
| Do any travel for charitable reasons? (include number of miles) | YES | | NO |
| Have medical, dental & vision bills (including premiums) in excess of 10% of your joint income that were not paid with pre-tax dollars? | YES | | NO |
| Did you receive or pay any alimony (do NOT include child support)? | YES | | NO |
| Did you receive any Unemployment Compensation? | YES | | NO |
| Sell any stock, bonds, or property? | YES | | NO |
| Cash out any IRA's or Retirement accounts? | YES | | NO |
| Receive funds via Paypal or Venmo in excess of \$600 and/or receive a 1099K? | YES | | NO |
| Do you pay for any Long Term Care Insurance (Nursing Home Ins.)? | YES | | NO |
| Did you pay out of pocket (not through payroll) for Health Insurance premiums? | YES | | NO |
| Start a new business? | YES | | NO |
| Start/buy a new business, or rental property or received rent for your personal property? | YES | | NO |
| Did you buy a new plug-in electric vehicle (EV) or fuel cell vehicle (FCV)? | YES | | NO |
| Did you have income from a foreign account, a foreign distribution or; receive, sell or acquire Virtual Currency? | YES | | NO |
| Did you make purchases while in WI that you did not pay sales tax on? | YES | | NO |
| If you answered Yes above: What is the total cost of those purchases? | \$ | | |
| Receive any correspondence from the IRS or WI Dept. of Revenue? | YES | | NO |
| Are you interested in seeing if you can put money into an IRA to help save tax? | YES | | NO |
| Complete this section if you had insurance through Marketplace: | | | |
| Did you take the advanced premium tax credit? | YES | | NO |
| Did you receive a statement from Marketplace?(please include w/information) | YES | | NO |