



In order to better serve my clients, and minimize any chances of missing taxable items or deductions, I require that this questionnaire be completed in full. Please answer the Y/N questions and complete the reverse side (including your contact & direct deposit info). At least one taxpayer must sign the form. If you have questions, never hesitate to contact me. I appreciate your past business and look forward to completing your tax return again this year.

****** If you answer YES to any of the following questions, please be sure to include the **** supporting information with your tax documents that you give me for tax preparation.**

During 2023 did you (or your spouse):

Get married, separated, or divorced?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Have a baby or adopt a child?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Change jobs?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Do you have a parent that you provide more than half of their support?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Pay any post-high school tuition for your dependant?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Pay tuition for your child(ren) to attend a private K-12 school?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Buy or sell a home?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Pay rent for your place of residence? If YES, total paid for 2023: _____	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
If you paid rent, was heat included in your rent?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Have you given cash, goods or property worth \$17,000 or more to any individual or Trust in 2023?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Pay any mortgage interest on your primary or secondary residence?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Pay interest on a home equity loan used to buy,build or improve your home?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Pay any property taxes for your primary residence?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Pay interest on a school loan?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Take any college or technical school classes?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Pay any daycare expenses for your dependant(s)?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Have a Dependant Care Flex Spending Account through your employer?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Make any cash contributions to a non-profit business or church?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Donate any non-cash items to St. Vincent De Paul, Goodwill, etc.?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Do any travel for charitable reasons? (include number of miles)	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Have medical, dental & vision bills (including premiums) in excess of 10% of your joint income that were not paid with pre-tax dollars?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Did you receive or pay any alimony (do NOT include child support)?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Did you receive any Unemployment Compensation?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Sell any stock, bonds, or property?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Cash out any IRA's or Retirement accounts?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Receive funds via Paypal or Venmo in excess of \$600 and/or receive a 1099K?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO

Do you pay for any Long Term Care Insurance (Nursing Home Ins.)?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Did you pay out of pocket (not through payroll) for Health Insurance premiums?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Start a new business, rental property or received rent for your personal property?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Did you buy a new plug-in electric vehicle (EV) or fuel cell vehicle (FCV)?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Did you have income from a foreign account, a foreign distribution or; receive, sell or acquire Virtual Currency?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Did you make purchases while in WI that you did not pay sales tax on?	<input type="checkbox"/>	YES	<input type="checkbox"/>	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?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Are you interested in seeing if you can put money into an IRA to help save tax?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO

Complete this section if you had insurance through Marketplace:

Did you take the advanced premium tax credit?	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
Did you receive a statement from Marketplace?(please include w/information)	<input type="checkbox"/>	YES	<input type="checkbox"/>	NO

Did the taxpayer or spouse renew their drivers license in 2023? If yes, complete below.

Taxpayer Issue Date: _____ Expiration Date: _____ Spouse Issue Date: _____ Expiration Date: _____

Please update Occupations below if they have changed this year:

Taxpayer's Occupation: _____ Spouse's: _____

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 below.

Taxpayer Signature / Date

Taxpayer Signature / Date

Which account would you like to use for your refund/tax due?

Same account as last year

Bank Name: _____ Checking or Savings (Circle One)

New account

Bank Name: _____ Checking or Savings (Circle One)

Routing Number: _____ Acct Number: _____

Even if nothing has changed, please complete the following:

Current Address: _____

Best Phone Number(s): _____ Whose is it? _____

Is it a CELL PHONE or LANDLINE (Circle one) Do you prefer: TEXT CALL EMAIL (Circle One)

Best Contact Email Address(s): _____