

2023 Income Tax Questionnaire

1. Did you make a qualified charitable deduction from an IRA in 2023? If so, from which account, how much, and to what charity? Was it directly distributed to the charity from the IRA?
2. Did you pay Long Term Care Insurance premiums in 2023? If so, how much?
3. Did you receive a notice from the IRS, Ohio, or local taxing authority regarding your 2022 income tax returns? If so, please include the notice with your tax information.
4. Did you buy or sell cryptocurrencies in 2023? If so, please include evidence of the purchases and sales with your tax documents?
5. Did you receive payments via Venmo, Paypal or other payment processors for the sale of goods or services? If so, how much? Are these payments included with your other business income, if any? Include form 1099K with your tax documents.
6. Do you have a Shared Custody Arrangement due to Divorce? If so, who claims the child(ren) based on the Divorce Decree?
7. Did you adopt a child in 2023? Or did you pay for childcare in 2023? If so, how much and to whom?
8. Did you purchase Health Insurance through Healthcare.gov? If so, include payment information with your tax documents.
9. Did you make a contribution to an IRA or HSA or Roth IRA in 2023? Please provide information with your tax documents.
10. Have you inherited an IRA since 2019? If so, when the owner of the IRA died, was he/she taking required minimum distributions (RMD)? At what age did the owner die? Did you take any distributions from the inherited IRA in 2023? Please include this information with your tax documents.
11. Did you pay quarterly estimated tax payments to the IRS? Ohio? School District? Local municipality? If so, please include evidence of those payments with your tax documents.
12. Did you install a qualifying electric system that uses solar, wind, geothermal or fuel cell power? Or did you make energy efficient improvements to your home (insulation, windows, doors, heat pump)? If so, please provide receipts for qualified purchases.
13. Did you purchase an Electric Vehicle? If so, please provide purchase information.
14. Please confirm bank routing number and account number for direct deposit of refunds.

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