

## 2023 New Client Questionnaire

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

### Taxpayer 1:

☐ Main contact person

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

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

Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Taxpayer 2:

☐ Main contact person

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

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

Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Home Address: \_\_\_\_\_  
\_\_\_\_\_, WI \_\_\_\_\_

- Would you like an Organizer next year for the tax return? ☐ Secure Portal ☐ Mail ☐ No
- Did you pay any estimated taxes? ☐ Yes (need dates and amounts) ☐ No
- For 2023, has your filing and/or marital status changed? ☐ Yes ☐ No  
(If so, what changed? Please include divorce date, if applicable) \_\_\_\_\_
- Dependent status: ☐ I'm a dependent ☐ I'm claiming dependents (List below) ☐ N/A  
Name: \_\_\_\_\_ SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ DOB: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Name: \_\_\_\_\_ SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ DOB: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
(Please use the space provided on the backside, if needed)
- Do you own your primary home or rent? ☐ Own (need Form 1098 Mortgage Interest) ☐ Rent  
Rent amount per month \$ \_\_\_\_\_ X No. of months \_\_\_\_\_  
Was heat included in your rent? ☐ Yes ☐ No **\*If your income is less than \$24,680, be sure to get a rent certificate filled out by your landlord(s).**
- Did you have Social Security Income? ☐ Yes (need SSA Form) ☐ No
- Did you have Unemployment Income? ☐ Yes (need 1099-G) ☐ No
- Did you have student loan interest? ☐ Yes (need 1098E) ☐ No
- Did you participate in any Crypto Currency activity? ☐ Yes (need excel file of sale info) ☐ No
- Did you pay child care or private school tuition? ☐ Yes ☐ No  
(For daycare, we need facility name, Federal ID#, address, and amount paid for each child.  
For private school, we need the tuition statement including what grade the child is enrolled in)

**(Please flip over & complete other side)**

- Did you contribute to an IRA or an Edvest/Tomorrow's Scholar account? ☐ Yes ☐ No  
(Please provide a statement showing contribution amounts or write at the bottom of this page)
- Did you make an HSA contribution or distribution in 2023? ☐ Yes ☐ No  
Is this full amount reported on your W-2? ☐ Yes ☐ No  
(If any contributions were made outside of payroll, we need the total. If you took money out of your HSA account, please provide form 1099-SA)
- Did anyone attend college last year? ☐ Yes ☐ No  
(If yes, we need 1098T and any Edvest or 529 Plan forms and please fill in information below)  
Has this student been consistently enrolled since they first enrolled? ☐ Yes or ☐ No  
When did the student first enroll? Season: \_\_\_\_\_ Year: \_\_\_\_\_
- Who provided your health insurance?  
☐ Plan through employer ☐ Marketplace/ Obamacare (need form 1095-A) ☐ Neither
- Did you have supplemental health insurance or long-term care insurance?  
☐ Supplemental ☐ Long-term care ☐ Neither  
(Please include amounts paid for each type of insurance, split by each taxpayer)
- Did you have any income from ownership of a business, rental property, or farm?  
☐ Yes, I have a schedule C, E, or F ☐ Yes, I'm a shareholder/partner ☐ No  
(Please include income & expenses for schedules C, E, or F and last year's depreciation schedule.  
For shareholders/partners, we need K-1(s))
- Did you receive any correspondence from any state or federal governing bodies last year?  
☐ Yes (provide a copy of correspondence) ☐ No

**Direct Deposit Information:**

Bank Name \_\_\_\_\_ Routing No. \_\_\_\_\_ ☐ Paper Check Requested  
Account # \_\_\_\_\_ ☐ Checking or ☐ Savings

*All of the information provided by me in this questionnaire (or any other accompanying or required documents) is correct, accurate and complete to the best of my knowledge.*

X \_\_\_\_\_  
Signature Date

**Extra notes you'd like for us to know/ watch for:**

*(For example: purchase or sale of home, passing of spouse, changes in dependent(s) etc.)*

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**(Please flip over & complete other side)**