



475 W. Terra Cotta Ave., Ste F1 Crystal Lake, IL 60014 815-788-5114

Tax Year 2023 Individual Questionnaire

Personal Information

Taxpayer and Spouse (If applicable) Name(s): _____

Address: _____

Is this a change of address? Yes No If Yes, date moved _____

Primary Telephone Number: _____

Primary Email Address: _____

Occupation: Taxpayer: _____

Spouse (if applicable): _____

General Information

(See page 11 at end of form to add further explanation)

		Yes	No
1.	Are you and your spouse (if applicable) both United States citizens? If no, provide an explanation of status: _____		
2.	Are you legally married?		
2a.	If yes to question 2, did you live with your spouse for the last six months of the year?		
3.	Did your marital status change in 2023 (new marriage, separation, divorce, or death)? If yes, explain the change: _____		
4.	Can you be claimed as a dependent by another taxpayer?		
5.	Are you legally blind? husband wife		
6.	Did you work in a state other than the state of your home address in 2023? If yes, provide details. _____		
7.	Do you want any potential tax refunds or overpayments applied to next year's estimates?		
8.	Do you want direct deposit of potential refunds into your bank account? If yes: Routing Number: _____ Financial Institution Name: _____ Account Number: _____ Account Type (checking or savings): _____ If married, is the account a joint account? Yes No		
9.	Do you want any potential taxes owed taken directly from the above bank account?		
10.	Do you want estimated payments for 2024 taken directly out of the above bank account?		
11.	Can the IRS and state tax authorities discuss questions about this return with us, as the preparer?		

Dependent Information

NOTE: If no dependents mark as 'N/A' and skip this page

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
1.	Did you have any changes to dependents in 2023? (give birth, adopt a child, new marriage, separation, divorce, death etc.) Explain: _____		
2.	Did you pay any expenses related to the adoption of a child during 2023, or adopt a U.S. child determined to have special needs?		
3.	Did you provide over 1/2 the support for any children under age 19 as of December 31, 2023 ? If yes, list names: _____		
4.	Do you have a child was over age 18 and under age 24 on 12/31/23 that was a full-time student that you provided over ½ the support for in 2023? (full-time student applies if they were a full-time student for a portion of any 5 months of the year) If yes, list names: _____		
5.	Did you have children listed under questions 3 or 4, with unearned income (generally interest, dividends, sales of investments, etc.) in excess of \$1,250 (or \$350 if the dependent is self-employed)?		
6.	Did all the children listed above live with you for over 1/2 the year (except temporary absences for college or other education?) If no, explain _____		
6a.	If yes to question 6, do you have documentation that will confirm the dependent lived with you and that you provided over ½ the support? (This is especially important in divorce or unique parenting situations.)		
7.	If your dependent did not live with you due to divorce or separation, provide a copy of the divorce decree or other form of separation agreement, which establishes custodial responsibilities. Provide a signed Form 8332 if you are claiming a dependent that did not live with you due to divorce or separation.		
8.	Are you entitled to, or did you give up a dependency exemption due to a divorce or separation, or allow anyone else to take the child tax credit for any of your children?? If yes, provide explanation _____		
9.	Did you provide over half the support for any person(s) other than your dependent child(ren) listed above in 2023 (parent, other relative, older child, etc.)? If yes, what is their relationship to you and approximate taxable income?		
10.	Is there another person, other than listed above, who lived with you more than half the year? If yes, what is their relationship to you and approximate taxable income?		
11.	Is your dependent required to file a tax return?		
11a.	If yes to question 11, do you want us to prepare the return?		
11b.	If yes to question 11, and we do not prepare their return, was the box checked on page 1 of the return that someone could claim them as a dependent? (There may be tax advantages to wait until we finish your return before filing for the dependent.)		
12.	Are all of your dependents citizens, nationals, or residents of the United States?		
13.	Did any of your dependents have foreign financial assets?		
14.	Did any of your dependents receive gifts or bequests from a foreign person or trust?		
15.	Do you have documentation to support all your answers above?		
16.	Have you ever had the child tax credit disallowed or reduced by the IRS?		
17.	Did you pay for childcare or dependent care while you worked, looked for work, or while a full-time student?		

Education Beyond High School

NOTE: If this does not apply, mark as 'N/A' and skip this section _____

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
1.	Did you or your dependent pay for educational expenses for college or beyond high school in 2023 for yourself, your spouse or a dependent? (Note that payment can include loans taken out by you or your dependent.) Attach Form 1098-T.		
2.	Was the student convicted, before the end of 2023, of a felony for possession or distribution of a controlled substance?		
3.	Did anyone in your family receive a scholarship or grant of any kind during 2023?		
3a.	If yes to question 3, were any of the scholarship or grant funds used for room and board or for expenses other than fees required for the course of education?		
4.	Did you make any withdrawals from an education savings or 529 Education Plan in 2023? If yes, provide the Form 1099-Q		
4a.	If yes to question 4a, were any of the funds rolled over into an Achieving a Better Life Experience (ABLE) account or another 529 Education account?		
5.	Did you use savings bond interest from a Series EE or I US Savings bond issued after 1989 to pay for education expenses in 2023?		
6.	Have you ever been denied a college credit or deduction, or had it reduced?		

Retirement Information

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
1.	Did you receive any Social Security benefits during 2023? If yes, and married, check the box of recipient(s): husband wife		
2.	Did you make contributions to the following in 2023? (check all that apply) IRA Roth IRA Keogh SIMPLE SEP 403(b) 401(k) or Roth 401(k) Other Qualified Plan (other than through an employer)		
3.	Did you have any withdrawals or distributions from the following in 2023? (check all that apply) IRA Roth IRA Keogh SIMPLE SEP 403(b) 401(k) Pension Annuity Other qualified retirement plan		
3a.	If yes, to question 3, were any of the amounts received repaid or rolled over into an IRA or qualified plan within 60 days of the distribution? Provide proof of rollover.		
3b.	If yes to question 3, and you were not age 59.5 or older at the time of distribution, were the funds used for purchasing a personal residence, paying unreimbursed medical expenses, higher education expenses or related to a federally declared disaster (federally declared disaster areas generally include hurricanes, tropical storms, floods and wildfires)? If yes, provide details.		
3c.	Were federally declared disaster funds received in a previous year repaid in 2023?		
4.	Did you convert IRA funds or other qualified retirement plan funds into a Roth IRA in 2023? If yes, provide details including Form 1099-R		
5.	If you are over age 73, did you take required minimum distributions (RMD) from your accounts in 2023 as required? If yes, provide Form 1099-R.		
6.	If over age 70 1/2, did the administrator of an IRA pay any charitable contributions directly from the IRA to a qualified charity in 2023?		
7.	If you have an inherited IRA are you taking required minimum distributions?		

Income

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
1.	Did you have income from jobs you worked as an employee? If yes, provide W-2 Form(s). How many? Taxpayer: _____ Spouse: _____		
2.	Did have income from a new job/employer in 2023? Name of employer: _____		
3.	Did you receive tip income not reported to your employer?		
4.	Did you receive interest income? (if yes, provide 1099-INT)		
5.	Did you redeem or cash any United States Savings Bonds?		
6.	Did you receive dividend income? (if yes, provide 1099-DIV)		
7.	Did you have sales of stock, securities or other income from a brokerage statement or online brokerage account such as Robin Hood, TD Ameritrade, Schwab, etc. in 2023? If yes, provide 1099 forms.		
8.	Did you receive any disability income? If yes, who paid the disability income?		
9.	Did you receive unemployment benefits during the year? Provide Form 1099-G.		
10.	Did you receive a state tax refund in 2023 for 2022 or any prior tax year? If yes, and it was not for 2022, or if we did not prepare the tax return, provide details.		
11.	Did you receive any Medicaid waiver payments as difficulty of care during 2023?		
12.	Did you engage in any bartering transactions in 2023 (including the use of virtual currency)? Explain: _____		
13.	Did you have Life insurance policies mature or surrender any policies in 2023?		
14.	Did you receive any of the following in 2023? (Check all that apply) Awards Prizes Hobby Income Gambling Winnings Lottery Winnings Jury Duty Pay		
15.	Did you receive any of the following fees in 2023? (Check all that apply) Director's Finder's Trustee Executor Other Miscellaneous income		
16.	Did you receive alimony payments in 2023 due to a divorce agreement dated 12/31/18 or prior? If yes, provide the divorce agreement if we do not already have.		
17.	Did you sell any of the following in 2023 (Check all that apply)? stock other than through a brokerage statement business interest rental property investment property or asset other than real estate If yes, attach supporting information.		
18.	Were you granted, or exercise, any stock options in 2023? If yes, provide details.		
19.	Were you granted any restricted stock in 2023? If yes, provide details.		
20.	Did you receive any income from legal proceedings in 2023? If yes, provide details.		
21.	Did you start a new business or invest in a new company (other than through a broker statement that you provided us) in 2023? If yes, provide details.		
22.	Did you generate any income from a side business, online sales, crowdfunding, blogging or other activity? Give us a brief explanation of business or activity. If yes, complete the separate <i>Single Member LLC and Unincorporated Business Questionnaire</i> available on our website or provide other detail of information.		
23.	Did you have any debts canceled or forgiven in 2023, (such as a home mortgage, student loan, credit card, or other indebtedness)?		
24.	Did you receive any income considered to be nonemployee compensation in 2023 (income for services performed not on a W-2 form)?		
25.	Did you receive a 1099-NEC, 1099-K or 1099-Misc in 2023. If yes, provide a copy.		

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
26.	Did you have any income from flow-through entities such as partnerships (including publicly traded partnerships (PTP)), S-corporations, or trusts or estates in 2023? Provide all pages of Schedule K-1(s) including basis and state information (unless we prepared the flow-through entity return). If more than one, consider providing a list of all entities.		
27.	Did you acquire a new or additional interest in a partnership, S-corporation, estate or trust in 2023? Provide name(s) of entities: _____		
28.	Did you dispose of any interests in partnerships, LLCs, S-corporations, estates or trusts in 2023? Provide name(s) of entities: _____		
29.	Did you foreclose or abandon a principal residence or real property in 2023?		
30.	Did you sell a principal residence or other real estate in 2023? If yes, provide the settlement sheet (closing disclosure) and Form 1099-S if received.		
31.	Did you purchase or exchange any real estate (including a principal residence) in 2023? Provide the settlement sheet and details.		
31a.	Was the purchase in question 31 for a rental property?		
32.	Did you convert an existing property to rental property in 2023?		
33.	Did you receive any income from renting your home or a different property in 2023? If yes, and information is not provided separately, complete the separate <i>Rental Income and Expense Worksheet</i> available on our website.		
34.	Did you refinance any existing loans on your home or other real estate you own? If yes, provide the settlement sheet (Closing Disclosure).		
35.	Did you receive income from property sold in a prior year or installment contract?		
36.	Did you receive any proceeds (including insurance) in 2023 on property, which was taken from you by destruction, theft, seizure or condemnation?		

Foreign Income, Assets and Transactions

NOTE: If this does not apply, mark as 'N/A' and skip this section _____

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
1.	Did you have any foreign income or pay any foreign taxes (other than from a broker statement, Form 1099 or K-1 that you have provided) or file any foreign information reporting or tax forms?		
2.	Did you receive a distribution from, or were you a grantor, transferor or beneficiary for a foreign trust?		
3.	Did you have a financial interest in, signing authority or other authority over a financial account such as a bank, securities, brokerage or other financial account (including savings, checking, deposit, time deposit, demand financial instruments account, debit card, credit card, retirement account, commodity futures, options account, insurance or annuity policy with a cash surrender value) in a country other than the United States?		
3a.	If yes to question 3, was the aggregate value of all your accounts over \$10,000 at any point during 2023?		
4.	Do you have an interest in any assets located outside the United States, have any financial accounts outside the United States, or hold interest in a non-U.S. entity? If yes, explain _____		
5.	Did you file any foreign information reporting tax forms during the year?		

Deductions and Credits

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
1.	Did you pay out-of-pocket medical expenses that were not reimbursed by insurance, and not paid with a health savings account or flexible spending account (Co-pays, prescriptions drugs, dental, etc.)? If yes, provide a rough estimate of the amount \$_____. We will follow up if it will benefit you to determine the actual amount.		
2.	Did you pay real estate taxes for your primary home?		
3.	Did you pay real estate taxes on any additional properties?		
3a.	If yes to question 3, what type of property were the taxes paid on? Rental Vacation home Other—describe _____		
4.	Do you live in a state that imposes personal property taxes (taxes on property other than real estate)? If you reside in Illinois, this does not apply. If yes, provide information on the personal property taxes paid.		
5.	Did you make any major purchases during 2023 that you paid sales tax on (car, boat, motor home, major home improvements, etc.)?		
6.	Did you make any energy-efficient improvements to your home or vacation home in 2023? (doors, windows, insulation or sealing systems, home energy audit, water heaters, air conditioners, furnaces, gas heat pumps or biomass stoves or boilers are potential examples) If yes, provide explanation: _____		
7.	Did you purchase and place in service any solar water heating, solar electric, fuel cells, small wind energy or geothermal heat pump to any property you own (not just your main home) in 2023?		
8.	Did you purchase a new or used clean energy (electric) vehicle that qualified for the clean vehicle credit? If yes, provide the purchase invoice, vehicle statement from the dealer, and note whether the vehicle was new or used.		
9.	Did you pay interest on a recreational vehicle or boat that has sleeping facilities, bathroom facilities and a cooking area? If yes, provide interest amount and further information.		
10.	Did you incur any mortgage interest on an existing home loan? Provide Form 1098.		
11.	If a loan with mortgage interest was ever refinanced, was the new mortgage more than the existing mortgage?		
12.	Was any mortgage interest paid on a home equity loan in 2023?		
12a.	If yes to 12, what were the funds from the home equity loan used for? _____		
13.	Did you refinance any existing loans on your home in 2023? Provide settlement sheet.		
14.	Did you incur interest expenses in order to make investments?		
15.	Did you make any monetary charitable contributions in 2023?		
15a.	If yes to question 15, see separate <i>Charitable Donation Rules</i> (available on our website or ask us to provide a copy), which provides recordkeeping and substantiation requirements for a deduction. (generally, a bank record and separate written acknowledgement that states that no goods or services were received, or a value for goods and services received.) Do you have the required records and substantiation required for the deduction?		
16.	Did you make any non-monetary charitable contributions in 2023 (clothes, furniture, etc.)? Provide details of organization name and address, cost, how acquired, contribution date, and fair market value for all donations.		

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
16a.	If yes to question 16, see separate <i>Charitable Donation Rules</i> (available on our website or ask us to provide a copy), which provides recordkeeping and substantiation requirements for a deduction. (In general, a separate written acknowledgement that states that no goods or services were received, or a value for goods and services received. Higher amounts may require an appraisal) Do you have the required records and substantiation required for the deduction?		
17.	Did you incur expenses for charitable purposes in 2023 such as parking fees, tolls, supplies, auto mileage or other expenses? If yes, provide details.		
18.	Did you donate a vehicle or boat in 2023? If yes, attach Form 1098-C or written acknowledgement from the organization.		
19.	Did you incur a casualty or theft loss or receive a condemnation award in 2023?		
19a.	If yes to question 19, did the loss occur in a Federally declared disaster area?		
20.	Did you lend money with the understanding of repayment that became totally uncollectable in 2023?		
21.	Did you have any securities or investments that became worthless during 2023?		
22.	Did you pay alimony in 2023 pursuant to a divorce dated 12/31/18 or prior? If yes, provide the amount of alimony (not child support) paid in 2023 and divorce decree if we do not already have a copy.		
22a.	If yes to question 22, can you confirm that you did not live with your ex-spouse in 2023?		
23.	Were you a K-12 educator working over 900 hours with unreimbursed teaching supply expenses in 2023? Provide amount: \$ _____		
24.	If you are an Illinois resident, did you pay Illinois educational expenses in excess of \$250 in 2023 for dependent(s) attending an Illinois school in grades K-12? If yes, how much did you pay? \$ _____		
25.	Did you make contributions to an education savings account or a 529 Education Plan in 2023? If yes, provide amounts contributed and beneficiaries		
25a.	If yes to question 25 and you are an IL resident, what type of plan was contributed to: Bright Start, Bright directions, College IL Prepaid Tuition, Other		
25b.	If yes, to question 25 and you are not an Illinois resident provide information on the plan contributed to: _____		
26.	Did you pay any student loan interest in 2023? If yes, provide amount. _____		
26a.	If yes to question 26, did an employer pay or reimburse you for any of the student loan interest?		
26b.	If yes to question 26, was any of the interest paid from a 529 Plan?		
27.	Did you incur moving costs in 2023 because of a permanent change of station as a member of the Armed Forces on active duty?		
28.	If eligible, do you wish to make additional contributions for tax year 2023 to (check all that apply) traditional IRA, Roth IRA, SEP retirement account or Health Savings Account? (Note: For an IRA, Roth IRA, or Health Savings Account, contributions must be made by 4/15/24)		

Health Care

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
1.	Did you have qualifying health care coverage, such as employer-sponsored or government-sponsored coverage (Medicare/Medicaid) for your family?		
2.	Did you or any member of your family obtain your health care coverage through the Exchange or Health Insurance Marketplace at Healthcare.gov? If yes, attach all Form(s) 1095-A you received.		
3.	Did you or any member of your family obtain healthcare coverage through the exchange or Healthcare.gov and share a policy with anyone who is not in your household or family (including non-dependent children, divorce situations or new marriages)?		
4.	Was your medical insurance paid through your employer?		
5.	Did you make any contributions to any of the following in 2023? (check all that apply) Health Savings Account (HSA) not through an employer Health Savings Account (HSA) through your employer Archer MSA		
5a.	If yes to question 5 above, was coverage in your high deductible health plan for family self-only		
5b.	If yes to question 5 above, how many months of 2023 were you in a qualifying high deductible health plan? _____		
6.	If in a high-deductible health plan, did you, or do you plan to, contribute additional funds to a Health Savings Account before April 15, 2024, for tax year 2023 ? If yes, provide details.		
7.	Did you receive any distributions from a Health Savings Account (HSA), Archer MSA or Medicare Advantage MSA in 2023? (Note: A Health Savings Account is separate from a health or flexible spending account through your employer. We only need information for a Health Savings Account (HSA).) Provide Form 1099-SA and Form 5498-SA.		
7a.	If yes to question 7, were all the distributions used for qualified medical expenses?		
8.	Did you pay any long-term care premiums for yourself or your family?		
9.	Did you make any contributions to an Achieving a Better Life Experience (ABLE) account? If yes, attach all Form(s) 5498-QA you received.		
10.	Did you or a dependent receive any distributions from an Achieving a Better Life Experience (ABLE) account? If yes, attach Form 1099-QA received.		
10a.	If yes to question 10, were all distributions used for qualified disability expenses in 2023? If no, explain _____		
11.	Did you receive a Health Coverage Tax Credit (HCTC) for eligible trade adjustment assistance (TAA), Alternative TAA, or as a Pension Benefit Guaranty Corporation Payee?		

Digital Assets including Virtual Currency and Non-fungible Tokens

Definitions: Digital assets include any virtual currency, cryptocurrency, stablecoins and non-fungible tokens. A virtual currency functions as a medium of exchange, a unit of account and/or a store of value. Cryptocurrency, such as Bitcoin, is an example of a virtual currency. Stablecoins are a cryptocurrency tied to financial instruments. Non-fungible tokens are digital/virtual assets that represent real items like artwork, music, videos, sports highlights, collectibles, etc.

NOTE: If this does not apply, mark as 'N/A' and skip this section _____

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
1.	Did you have a receipt of new virtual currency through a hard fork or airdrop? If yes, have you provided the fair market value of the new currency?		
2.	Did you have an exchange or use virtual currency for property, goods or services?		
3.	Did you have a sale of virtual currency or digital assets?		
4.	Did you have an exchange of virtual currency for another virtual currency?		
5.	Did you acquire or receive new digital assets from mining or staking activities?		
6.	Did you invest in or sell nonfungible tokens or digital artwork?		
7.	Did you have any other disposition of a financial interest in digital assets other than those in the above questions?		
8.	Did you have virtual currency or digital assets held in a foreign account?		
9.	At any time during 2023, did you receive (as a reward, award, payment, compensation, or other transfer); or sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Was your activity covered by a previous question? yes no If "no" give further explanation _____		

Miscellaneous Information

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
1.	Did you make gifts totaling \$17,000 or more to any one individual (directly, indirectly, or to a trust) in 2023?		
2.	Did you make any discounted gifts or gifts of future interest to any person or trust in 2023?		
3.	Do you want \$3 to go the Presidential Election Campaign Fund? (This will not change your tax or reduce your refund.) Taxpayer: Yes No Spouse: Yes No		
4.	Did you or any of your dependents receive an Identity Protection Pin (IP PIN) from the IRS? If yes, provide the 2023 IRS letter.		
5.	Have you or any of your dependents been the victim of identity theft in 2023?		
6.	Were you a resident of, or did you have income from, more than one state during 2023? If yes, provide details. You may be required to file tax returns and may also owe taxes in those states.		
7.	Did you retire in 2023?		
8.	Did you pay an individual over 18 (not a corporation) as a household employee (such as a housekeeper, yard worker, nanny, eldercare assistant, health aide, etc.) \$2,600 or more for the year, or over \$1,000 in any calendar quarter to all household employees? If yes, provide W-2 form issued to each household employee.		
9.	Did you make any out-of-state purchases (phone, internet, mail, catalog, in person) for use in your home state that the seller did not collect state sales or use tax?		

Please provide documents or explanation for all "yes" answers		Yes	No or N/A
10.	Is there any other information needed to prepare a complete and accurate tax return? If yes, please explain.		
11.	Did you receive correspondence from the IRS or a state, taxing agency, or receive notification of a change to the return of a company that you have an investment in? If yes, please provide a copy of all notices or correspondence received.		
12.	Have you had estate planning done, or updated your will or trust documents in the past three years?		
13.	Have you checked your beneficiaries on retirement accounts, life insurance policies, annuities, 529 Education Plans and all bank, investment, stock option, restricted stock, or other accounts including those designated as "Transfer on Death" or "Pay on Death" in the past three years?		
14.	Do you expect a large fluctuation in income, deductions or withholding next year? Provide details. This will help in calculations of estimates for 2024.		

Estimated Tax Payments

		Yes	No or N/A
1.	<p>Other than through withholding from pay or other accounts, did you make any estimated tax payments for 2023? If yes, what were the dates and amounts of your federal payments?</p> <p>Date: _____ Amount: _____ Date: _____ Amount: _____ Date: _____ Amount: _____ Date: _____ Amount: _____ Date: _____ Amount: _____</p> <p>If yes, what were the dates and amounts of your state payments?</p> <p>Date: _____ Amount: _____ State: _____ Date: _____ Amount: _____ State: _____ Date: _____ Amount: _____ State: _____ Date: _____ Amount: _____ State: _____ Date: _____ Amount: _____ State: _____</p>		

By entering your name below, you confirm to the best of your knowledge that the information and documents provided with this questionnaire are complete and accurate. If married filing jointly, acknowledge that you have been given permission to complete the form for both of you.

Printed name of person(s) completing form: _____

