

2023 CLIENT CHECK LIST

Marital Status (as of 12/31/2023)?

MARRIED SINGLE SINGE WITH DEPENDENTS MARRIED FILING SEPERATE

- If married but separated from spouse, please notify tax person.

Address changes?

Yes No

- If yes, please provide new address _____

Dependent Claimed

- If claiming new child/children please provide their social security card and date of birth

Did any of your children attend college in 2022? Yes No ***If yes, please provide 1098T**

Did you have more than \$10,000 in a personal foreign bank account at any point in 2022?

Yes No

Did you have any virtual currency transactions? (Bitcoin, Ethereum, or Coinbase Account)

Yes No *If Yes, provide statements

Did you receive a 1099 K from any 3rd party vendor? (venmo, etc) Yes No

Did you replace any of the following in your home in 2022? NONE

Windows Furnace/Air Con. Water Heater Ext Doors Solar Geothermal

Did you purchase an electric vehicle? Yes No

Did you refinance your home? Yes No

- If yes ,provide closing statement

Did you sell any investment property?

- If yes, provide transaction details for the tax year.

Did you have a Health Savings Account? Yes No ***Please provide 1099 SA if applicable**

- If yes, did you take money out? Yes No

County of Residence and School District _____

Email Address used to contact with questions _____

Phone Number to contact with questions _____

Signature &Date : _____