

NAME: _____ BEST Phone# _____ Is it ok to text? _____ DATE _____

Email address: _____

Current mailing address _____

****PLEASE ANSWER EVERY QUESTION OR PLACE N/A IN THE BLANK****

Marital status as of 12/31/2022 (circle one): Married, Single, Separated, Divorced

Did you pay college tuition for anyone on the return (even if paid with student loans)? _____ ***If so, attach FORM 1098T**

Did you pay any Student Loan Interest? _____ ***If so, attach FORM 1098E**

Did you install new Windows/doors/insulation/heatpump/air cond/gas hot water heater? _____ **If so, see Shirley!**

Did you receive any **unemployment** benefits? _____ **If so, attach your Form 1099G.**

For educators, did you have **unreimbursed** educator expenses? _____

Did you pay premiums for Long Term Care Insurance (nursing home) or did you **prepay** funeral expenses? _____

Did you, your spouse, or your dependents have **Marketplace** insurance (ie, ObamaCare/Healthcare.gov)? If so, you **MUST attach FORM 1095A**. If you do not provide the form, the IRS will not process your return and you will not receive your refund. _____ YES or _____ NO

Did your or your spouse's photo ID expire since completing your last tax return? If so, please provide a copy of your new ID or bring your new ID with you and we can make a copy of it. _____

Did you or your spouse conduct **ANY transaction** with Crypto Currency such as BitCoin, Dogecoin, etc? _____

Did you or your spouse have signature authority over any Foreign Bank Accounts? _____

Did you purchase anything online that you were **NOT** charged **SALES TAX** for? If so, what is the total of those purchases? _____

Do you want Direct Deposit of your refund? YES or NO (If YES, see Bank info below)

Do you want Direct Draft if you have a balance due? YES or NO (If YES, see Bank info below)

***** Name of Bank _____ Last 4 digits of acct # _____**

***If this is a new account from what we have on file, attach a VOIDED check or acct id card**

Do you or your spouse have any concerns to ask your preparer about? Make a note here, and we will be sure to ask you when we call.

BEST TIME TO CALL YOU TO DISCUSS YOUR RETURN: _____