

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

Email address: _____

Current mailing address _____

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

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

List first name of each dependent claimed last yr that you will claim again this year** _____

List full name, date of birth, and SSN for new dependents (provide birth certificate and Social Security Card)** _____

****For all dependents, please provide something that proves they lived with you. Ex: A piece of mail, bank statement, medical bill, report card, school mailing, etc. that came to your address in your dependent's name.**

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 (for nursing home care) or did you prepay funeral expenses? _____

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**

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? _____



Did you pay for childcare? _____ If so, provide a **stmt. from the provider** with their ID number & address along with the names of the children and the amount you paid for each.

Did you contribute to a Virginia College Savings Plan for your child/children? _____

Regarding your child(ren):

1. List each child and tell how many months that child lived with you **this tax year**: _____

2. For shared custody or in cases where the parents do not live together, give the details:

3. Have you given permission to anyone else to claim your child(ren)? _____

4. Has the IRS disallowed your claim for any credits in the past? _____

5. If the IRS should request documentation to prove the child(ren) are related to you as stated **and** that they lived with you over half the year, could you provide such documentation? _____

2. For each of your children, please provide the name of the school/college or daycare where the child attends.

3. **Please bring some form of documentation showing the child(ren) have the same address as you.** This could be an insurance card if it contains an address, a mailing from the school such as a report card, a bank statement, a medical bill, a birthday card that was mailed, etc.

4. If you are not married (or you are married, but are living apart from your spouse), and you think you may qualify for Head of Household filing status, please request and fill out the Head of Household questionnaire.

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: _____