

2023 Questionnaire

All questions pertain to activity during the year ended 12/31/2023 unless otherwise noted

Name _____ Name _____
Occupation _____ Occupation _____
Email _____ Email _____
Cell Phone # _____ Cell Phone # _____
Home Phone # _____

If we have questions, who should we contact? _____

What format do you prefer for your copy of the 2023 tax return? (check all that apply)

- Portal and Paper Copy
- Paper Copy only
- PDF via Portal only
- Paper Copy by mail (\$10 fee)
- Portal and Paper Copy by mail (\$10 fee)
- Would you like a meeting to review your return?
 Yes No
- How would you like your original docs returned?
 Mail (\$10) Pickup

Bank Account Information. (Bank info must be verified every year.)

- I want any refund to be directly deposited. I want any balance due to be directly withdrawn.
- I want my 2024 estimated payments to be directly withdrawn.

If you checked any of the above, please provide info below or provide a voided check.

Bank Name _____
Routing _____
Account _____

Personal Information

- | | Yes | No |
|---|--------------------------|--------------------------|
| Will you possibly need a payment plan with the IRS? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any estimated tax payments towards your 2023 tax liability (outside of payroll or retirement withholding)? If yes, provide detail. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did your marital status change during the year?
If yes, explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| Did your address change from last year?
If yes, new address: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you or your dependents receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you reside or operate a business in a Federally declared disaster area? | <input type="checkbox"/> | <input type="checkbox"/> |

Dependent Information

- | | | |
|--|--------------------------|--------------------------|
| Were there any changes in dependents from the prior year?
If yes, explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have any children under age 19 or a full-time student under age 24 with investment income in excess of \$2,500? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have dependents who must file a tax return? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you provide over half the support for any person(s) other than your dependent children during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay for child care, summer camps, or before/after school care? | <input type="checkbox"/> | <input type="checkbox"/> |

Self-Employed Information (Self-Employed Individuals Only)

- | | Yes | No |
|--|--------------------------|--------------------------|
| Did you receive any income considered to be nonemployee compensation, as an independent contractor or gig worker? If yes, provide 1099's received. | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have a home office used regularly and exclusively for business? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you provided total business mileage for 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay for health insurance premiums while self-employed? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you start a new business during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell, exchange, or purchase any assets used in your trade or business? | <input type="checkbox"/> | <input type="checkbox"/> |

Purchases, Sales and Debt Information

	Yes	No
Did you acquire a new or additional interest in a partnership or S corporation?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange, or purchase any real estate during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you foreclose or abandon a principal residence or real property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire or dispose of any stock during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take out a home equity loan this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you refinance a principal residence or second home this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you lend money with the understanding of repayment and this year it became totally uncollectable? If yes, please provide loan documentation and evidence of efforts to collect.	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any debts canceled or forgiven this year, such as a home mortgage, credit cards, or student loan(s)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a qualified plug-in electric drive vehicle this year? If yes, attach the vehicle statement from dealer.	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any energy efficient improvements to your main home this year? If yes, attach the invoice(s).	<input type="checkbox"/>	<input type="checkbox"/>

Income Information

At any time during 2023, did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currencies or cryptocurrencies (i.e. Bitcoin, Ethereum, Cardano, Dogecoin, etc.) or other digital assets (e.g. NFTs)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any payments for property sold prior to this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any disability income during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay or receive alimony payments, if the agreement was effective prior to 12/31/2018? If yes, date of divorce: _____	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any unemployment benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did any of your life insurance policies mature, or did you surrender any policies?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	<input type="checkbox"/>	<input type="checkbox"/>
Do you expect a large fluctuation in income, deductions, or withholding next year?	<input type="checkbox"/>	<input type="checkbox"/>

Retirement Information

Did you receive any Social Security benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an IRA, Roth, SIMPLE, SEP, 401(k), or other qualified retirement plan(s)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions, outside of your payroll, to an IRA, Roth, SIMPLE, SEP, 401(k), or other qualified retirement plan(s)? (Circle all that apply)	<input type="checkbox"/>	<input type="checkbox"/>
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2023?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to put money into a traditional IRA before April 15th to save on taxes?	<input type="checkbox"/>	<input type="checkbox"/>
Did you contribute any of your RMD directly to charity?	<input type="checkbox"/>	<input type="checkbox"/>

Education Information

Did you, your spouse, or your dependents attend a post-secondary school? If yes, provide Form(s) 1098-T and qualified expense receipts.	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from or contributions to an education savings or 529 Plan account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any student loan interest this year? If yes, provide any Form(s) 1098-E.	<input type="checkbox"/>	<input type="checkbox"/>
Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?	<input type="checkbox"/>	<input type="checkbox"/>

Health Care Information

	Yes	No
Did you enroll for Marketplace Coverage through healthcare.gov under the Affordable Care Act (a/k/a ObamaCare, ACA)? If yes, provide forms 1095-A.	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to a Health Savings Account (HSA) or Archer MSA?	<input type="checkbox"/>	<input type="checkbox"/>
Did you use any funds from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA? If yes, provide form(s) 1099-SA.	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay long-term care premiums for yourself or your family?	<input type="checkbox"/>	<input type="checkbox"/>

Itemized Deductions (Answer below only if amounts exceed 2023 standard deduction amounts: Single: \$13,850, Married Joint: \$27,700, HoH: \$20,800)

Did you pay substantial out-of-pocket medical expenses (i.e. \$5,000+)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any cash or noncash charitable contributions? If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment to substantiate all contributions made.	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay real estate taxes for your primary home and/or second home?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any mortgage interest on an existing home loan? If yes, provide any Form(s) 1098 you received.	<input type="checkbox"/>	<input type="checkbox"/>
Did you incur interest expenses associated with any investment accounts you held?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a vehicle, boat, RV or home building materials? If yes, please provide amount of sales tax paid.	<input type="checkbox"/>	<input type="checkbox"/>

Miscellaneous Information

Did you gift more than \$17,000 to any individual?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any individual as a household employee during the year? If yes, did you issue any required Form(s) W-2?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive correspondence from any State or the IRS? If yes, explain or provide notice: _____	<input type="checkbox"/>	<input type="checkbox"/>
Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?	<input type="checkbox"/>	<input type="checkbox"/>

Foreign Information

Did you have any foreign income or pay any foreign taxes, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a distribution from, or were you a grantor or transferor for a foreign trust or estate?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account located in a foreign country?		
If yes, were the combined balances greater than \$10,000 at any point during the year?	<input type="checkbox"/>	<input type="checkbox"/>

**Please upload this completed questionnaire as well as any supporting documentation to your secure portal account as soon as possible to ensure timely delivery of your return.
(If you don't have a portal, email gplacers@pjkcpa.com or call 727-785-2773)**



**Palm Harbor: 727-785-2773 Trinity: 727-569-2244 Wesley Chapel: 727-756-5300
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