

The following information is needed to proceed with your 2023 tax year filing

**PLEASE COMPLETE THE FRONT AND BACK OF THIS SHEET AND
ENCLOSE WITH YOUR TAX DOCUMENTS**

- Did your marital status change during the year? **YES / NO**
- Did your address change during the year? **YES / NO**
- Did you have any changes in dependents during the year? **YES / NO**
- Did you have any childcare expenses during the year? **YES / NO**
 - If yes, please provide name, address and EIN number of provider, and the total paid.
- Did any member of your household have health coverage through the Marketplace? **YES / NO**
 - If yes, please provide form 1095-A.
- Did you receive any distributions from a Health Savings Account (HAS), Archer MSA, or Medicare Advantage MSA during the year? **YES / NO**
- **NJ residents only**: Were all individuals on the return covered by a qualified health insurance plan for all 12 months of the tax year? **YES / NO**
- Did you purchase An all-electric or a plug-in hybrid vehicle during the year? **YES / NO**
 - If yes, **PURCHASE INVOICE MUST BE PROVIDED**
- Did you receive any payments/distributions from a pension, IRA, or 401(k) plan during the year? **YES / NO**
- Did you make any contributions to or execute any rollovers from an IRA, Roth, SEP, 401(k), etc (other than payroll deductions)? **YES / NO**
- Did you receive any Social Security benefits during the year? **YES / NO**
- Did you pay tuition expenses for secondary education for yourself, your spouse, or a dependent? **YES / NO**
 - If yes, please provide form 1098-T and a detailed record of financial activity from school.
- Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year? **YES / NO**
 - If yes, please provide form 1099-Q
- Did you pay student loan interest? **YES / NO**
 - If yes, please provide form 1098-E

- Did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currencies? **YES / NO**
- Did you make gifts to any one person in excess of \$17,000 during the year? **YES / NO**
- Did you make any energy-efficient improvements to your main home? **YES / NO**
 - If yes, **DETAILED INVOICES MUST BE PROVIDED**
- Do you want to have any refund directly deposited to your bank account?
 - **Checking/Savings | Routing #:** _____ **|Account#:** _____
 - **IF NO INFORMATION IS PROVIDED YOU WILL RECEIVE A CHECK**
- Do you want to have any balance due directly withdrawn from your bank?
 - **Checking/Savings | Routing #:** _____ **|Account#:** _____
 - **IF NO INFORMATION IS PROVIDED YOU WILL RECEIVE A VOUCHER**
- Did you have a financial interest in or a signature authority over a financial account or asset located in a foreign country? **YES / NO**
 - If yes, did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year? **YES / NO**
- Did you own property in a foreign country? **YES / NO**
- Did you receive unemployment? **YES / NO**
 - If yes, in which state? _____
 - If yes, please provide form 1099-G
- Did you make any estimated payments towards your 2023 taxes? **YES / NO**
 If yes, please provide dates and payment amounts

	<u>Date Paid</u>	<u>Federal</u>	<u>State</u>	<u>Local</u>
<u>1</u>				
<u>2</u>				
<u>3</u>				
<u>4</u>				
- Please provide copies of driver's licenses for taxpayer and spouse (if joint return)

Name: _____

Phone Number: _____ E-mail address: _____

Signature: _____ Date: _____