

## Jupiter CPA, Inc. 2023 Questionnaire

Please fill in the appropriate Circle and INCLUDE ALL THE NECESSARY DETAILS AND DOCUMENTATION

### Personal Information:

O YES O NO Did your marital status, home address, contact, or banking information change within the past year?  
O YES O NO Could you or your dependents be claimed as a dependent on someone else's return for 2023? If yes, list:

\_\_\_\_\_ O  
YES O NO Did you receive correspondence from the state or IRS? Please provide a copy.

O YES O NO If you have an overpayment or owe taxes would you like to apply them to estimated payments or auto deposit or debit? Account# \_\_\_\_\_ Routing # \_\_\_\_\_ O

YES O NO Did you make any estimated payments during the year? If yes, Amounts and dates of each: \_\_\_\_\_

### Dependent Information:

O YES O NO Were there any changes in dependents, and did they earn money and file their own tax return? If yes, explain \_\_\_\_\_ O

YES O NO Did you provide over half the support for any other persons other than your dependent children during the year? If so, who? \_\_\_\_\_ ss# \_\_\_\_\_ DOB \_\_\_\_\_

O YES O NO Did you pay for childcare while you worked, looked for work, or while a full-time student? If yes, provide receipts \_\_\_\_\_ and EIN \_\_\_\_\_

O YES O NO Are you divorced or separated with child(ren) (within the past year); do you have a finalized divorce decree?

### Purchases, Sales, and Debt Information:

O YES O NO Did you start, sell, or purchase a business or rental property during 2023? If so, provide documents.

O YES O NO Did you acquire or lose any stock this year? Provide realized gains/losses.

O YES O NO Did you purchase, sell, or refinance a principal residence or second home this year? If so, provide closing documents.

O YES O NO Did you have any debts canceled or forgiven this year, such as, home mortgage or student loans? \*\* O YES

O NO Are you owed money which became uncollectable or incurred a loss because of damage or stolen property?

### Income Information:

O YES O NO Did you receive unemployment or disability benefits/income this year? Provide disability/income or 1099-G

O YES O NO Did you make or receive a gift for more than \$17,000 to or from anyone? \_\_\_\_\_

O YES O NO Did you receive any awards, prizes, hobby income, gambling, or lottery winnings? \_\_\_\_\_ O YES O NO Did you pay or receive alimony due to divorce? If so, how much? \_\_\_\_\_

**Retirement Information:**  
O YES O NO Did you receive any Social Security benefits during the year? Provide SS statement

O YES O NO Did you receive any payments (lump sum or regular) from a pension, profit sharing or 401(k) plan? Provide 1099-R

O YES O NO Did you make contributions, or roll over to an IRA, Roth, Keogh, Simple, SEP, or other qualified retirement plan? How Much? \_\_\_\_\_

**Education Information:**

O YES O NO Did you, your spouse, or dependents attend a post-secondary school during the year? Provide 1098-T

O YES O NO Did you pay any student loan interest this year? Provide 1098-E

O YES O NO Did you contribute or receive a distribution from an education savings account? \_\_\_\_\_

### Health Care Information:

O YES O NO Did you enroll in Marketplace Coverage through healthcare.gov? Please provide any Form(s) 1095-A O YES O NO Did you make any contributions to a Health savings account (HSA) or Archer MSA?

O YES O NO Did you receive any distributions from a HSA, Archer MSA, or Medicaid Advantage MSA this year?

### Miscellaneous Information:

O YES O NO Did you receive an Identity Protection PIN from the IRS, or have you (or a dependent) been a victim of Identity Theft? \*\* PIN# \_\_\_\_\_

O YES O NO Did you want a copy of your return emailed to you? E-mail: \_\_\_\_\_ O YES O NO Did you use fuel for any off-road business or commercial Fishing? Provide receipts O YES O NO Did you engage in a transaction involving virtual currency in 2023?

O YES O NO Did you make energy efficient improvements to your home?

**Itemization: If you can overcome the standard deductions (Married filing jointly \$27,700, Single filer \$13,850, HOH - \$20,800:**

O YES O NO Did you pay long-term care premiums for yourself or your family? \_\_\_\_\_ O YES O NO Did you make any cash or non-cash charitable contributions (clothes, furniture, etc.)? Attach totaled receipts.

O YES O NO Did you use your vehicle on the job, other than commuting? Provide mileage.

O YES O NO Did you work out of town for part of the year? Provide receipts.

O YES O NO Did you utilize an area of your home for your business?

O YES O NO Did you make any major purchases during the year (including cars, electric vehicles, boats, etc.)? Provide Bill of Sale. O YES O NO Did you pay state or local real estate property taxes this year? How much? \$ When?