

2023-2024 QUESTIONNAIRE

TAX RETURNS WILL NOT BE PREPARED WITHOUT A QUESTIONNAIRE !!

DO NOT FILL THIS OUT UNTIL AFTER JANUARY 22nd.

(Questions may change!!)

1) CLIENT NAME(s) _____

2) Did you get married, divorced, adopt or have any children in 2023 - details required

3) Did you move in 2023 - details required

4) Your full Bank **routing** number for auto-deposit _____ Savings _____ Checking _____

5) Your full Bank checking/savings **account** number _____

6) Cell Phone # _____ Home/Work # _____

7) Email _____

8) Do you prefer to be contacted by: Email _____ Phone Call _____ Text _____

DRIVERS LICENSE INFORMATION:

9) **Annually** we are required to include taxpayer's D/L information as Identity Verification:

FIRST name on Return _____ DL# _____

Issue Date _____ Exp Date _____

SECOND name on Return _____ DL# _____

Issue Date _____ Exp Date _____

RECEIVING MY COPIES: (Receiving tab on our Homepage has details) check **only one below**

10 _____ I/We agree to copies (no charge) sent in an email with personal information masked

_____ I/We understand to the **\$25 fee** to receive paper copies sent by U.S. mail

11 Do you want NEWS/UPDATES by: _____ Following on Facebook _____ Following on Instagram

_____ Text Message _____ Email _____ N/A

AMOUNT OWED TO THE IRS:

You have options if you have an amount due (X) for option(s) you're interested in

- You can pay online for free from your checking account.
- We can send you paper coupons to mail in your payment.
- We can initiate an Installment Agreement for you if needed.
- We can pay your Balance Due *at the time* we electronically file your return(s)
(We'll contact you for your pre-approval, with the amount, before filing)

INDICATE YES or NO below to confirm you haven't overlooked any that pertain to you

- W-2's, 1099's, Unemployment Compensation 1099-G
- Report any interest and/or dividends from banks or investment accounts
- Did you have any transactions with **Bitcoin** or any form of **digital assets**
- Withdrawals and/or Contributions to an IRA/401k/SEP - paperwork is required
- Retirement/Pension received - Form 1099-R
- Health Savings Account paperwork is required - BOTH Form 1099-SA and Form 5498
- Healthcare Marketplace Insurance Information Form 1095-A
- Did you receive a W2-G for Gambling Winnings
- Student Loan Interest Paid Form 1098-E
- Tuition Paid/Educational Expenses Form 1098-T
- Did you receive a 1099-C (for Cancellation of Debt)
- Mortgage and property tax information for 2023 if it's determined you're able to itemize
- Rent paid for a MI residence - need Landlord's name & address and monthly amount paid
- Childcare Costs - need daycare provider name, ID#, address and total amount paid
- Sub-Contractors/Self-employed submit income & expense summary and form 1099-NEC
- Those collecting SS, SSI or SSDI benefits - Submit year end SSA-1099 Statement(s)
- If you received Child Support include the amount when submitting your papers

**YOU MAY RECEIVE AN AUTOMATED TEXT FROM OUR
OFFICE FROM: 313-992-2117**

PHONE 313-388-8800 FAX 313-388-9785 TEXT/CELL 313-506-0346