2023-2024 QUESTIONNAIRE

TAX RETURNS WILL NOT BE PREPARED WITHOUT A QUESTIONNAIRE !!

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

12 Do you prefer to pay by: \_\_\_\_Venmo \_\_\_\_Zelle \_\_\_\_CashApp \_\_\_\_Credit/Debit Card

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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