Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse—enter "?" if unsure about a question.

LIFESTYLE & TAXES

Yes	No	Are either you or your spouse legally blind?
Yes	No	Did you pay or receive alimony in 2022? *Recipient's SSN* / *Date of divorce or separation* Paid Received $
Yes	No	Did you purchase health insurance through a public exchange?
Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?
Yes	No	Did you pay anyone for domestic services in your home?
Yes	No	Did you purchase a new energy-efficient car, truck, or van?
Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?
Yes	No	Are you a member of the military? *State of residency*
Yes	No	Were you a citizen of or lived in a foreign country? *Foreign country*
Yes	No	Do you own or have financial interest in a foreign bank or financial account? *Maximum value* $
Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? *Designee's name* *Phone number* *PIN (any five digits)*

CHILDREN & EDUCATION

Yes	No	Were any children born or adopted in 2022? *(Provide statement for other expenses.)*
Yes	No	Were any children attending college? *(Provide Form 1098-T.)*

Year in college	Paid by you: *Tuition* $	*Student loan interest* $	*Books* $
	Paid by student: *Tuition* $	*Student loan interest* $	*Books* $

Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?

Student	*Amount paid* $
Name and address of school	

Yes	No	Did you pay for child or dependent care so you could work or go to school? *(add statement if needed)*

Name of provider	*EIN or SSN*
Address	*Amount paid* $

Yes	No	Do you have any children who have unearned income of $1,150 or more?
Yes	No	Did you make any contributions to a 529 plan in 2022?

INVESTMENTS

Yes	No	Did you, or will you, contribute any money to an IRA for 2022? Traditional IRA Roth IRA
Yes	No	Did you roll over any amounts from a retirement account in 2022?
Yes	No	Did you sell or transfer any stock or sell rental or investment property?
Yes	No	Did you receive any income from an installment sale?
Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2022?
Yes	No	Were you granted, or did you exercise, any employee stock options during 2022?
Yes	No	Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

DEDUCTIONS

Yes	No	Did you, or do you plan to, contribute money before April 18, 2023 to an HSA for 2022? If yes, provide details.
Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.
Yes	No	Did you pay sales taxes on a major purchase in 2022, such as a vehicle, boat, or home?
Yes	No	Did you make any charitable contributions in 2022? If yes, provide details.

BUSINESS

Yes	No	Did you work from a home office or use your car for business?
Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?
Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?

HOME

Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.
Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.
Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.
Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?
Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.

State information   Full-year resident   Part-year resident   Nonresident   School district

States of residence during 2022 and dates ____   Do you rent or own your home?   Rent   Own

Total rent paid $ ____   Includes heat?   Yes   No