

## Questions

Please check the appropriate box and include all necessary details and documentation.

	Yes	No
<b>Personal Information</b>		
Did your marital status change during the year? If yes, explain: _____	<input type="checkbox"/>	<input type="checkbox"/>
Did you live separately from your spouse during the last six months of the year?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a separate decree, instrument, or agreement and are not living in the same household by the end of the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did your address change from last year?	<input type="checkbox"/>	<input type="checkbox"/>
Can you be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? If yes, please attach a blank, voided check from the account.	<input type="checkbox"/>	<input type="checkbox"/>
Do you, your spouse (if applicable), and any dependents have a taxpayer identification number (SSN, ITIN, or ATIN)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter for filing returns in 2023.	<input type="checkbox"/>	<input type="checkbox"/>
Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires and other disaster situations.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Dependent Information</b>		
Were there any changes in dependents from the prior year? If yes, explain: _____	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,500?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have dependents who must file a tax return?	<input type="checkbox"/>	<input type="checkbox"/>
Did you provide over half the support for any other person(s) other than your dependent children during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for child care while you worked, looked for work, or while a full-time student?	<input type="checkbox"/>	<input type="checkbox"/>
Is there any other person(s) who lived with you more than half the year but not claimed by you last year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any expenses related to the adoption of a child during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If you are divorced or separated with child(ren), do you have a divorce decree		

or other form of separation agreement which establishes custodial responsibilities?

Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft? If yes, attach the IRS letter for use during 2023

### **Purchases, Sales and Debt Information**

Did you start a new business or purchase rental property during the year?

Did you have ownership interest in any type of business?

Did you sell, exchange, or purchase any assets used in your trade or business?

Did you acquire a new or additional interest in a partnership or S corporation?

Did you sell, exchange, or purchase any real estate during the year?

Did you purchase or sell a principal residence during the year?

Did you foreclose or abandon a principal residence or real property during the year?

Did you acquire or dispose of any stock during the year?

Did you take out a home equity loan this year?

Did you refinance a principal residence or second home this year?

Did you sell an existing business, rental, or other property this year?

Did you lend money with the understanding of repayment and this year it became totally uncollectable?

Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)?

Did you purchase a new or previously owned Clean vehicle this year that is eligible for the new clean vehicle credit? If yes, attach the vehicle statement from the dealer.

### **Income Information**

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?

Did you receive any income from property sold prior to this year?

Did you receive any unemployment benefits during the year?

Did you receive any disability income during the year?

Did you receive any Medicaid waiver payments as difficulty of care during the year?

Did you receive tip income not reported to your employer this year?

Did any of your life insurance policies mature, or did you surrender any policies?

Did you receive any awards, prizes, hobby income, gambling or lottery winnings?

Did you receive any income considered to be nonemployee compensation?

Did you receive a Form 1099-K, 1099-MISC, 1099-NEC, or other income statement for work done in what is commonly referred to as the "gig" economy?

Do you expect a large fluctuation in income, deductions, or withholding next year?

Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork, or used digital assets to pay for goods or services)?

### Education Information

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?

Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent?

Did anyone in your family receive a scholarship of any kind during the year? If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?

Did you make any withdrawals from an education savings or 529 Plan account? If yes, were any of these withdrawals rolled over into an ABLE (Achieving a better Life Experience) account?

Did you make any contributions to an education savings or 529 Plan account?

Did you pay any student loan interest this year?

Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?

### Health Care Information

Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? ("Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.)

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act?

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family?

Did you make any contributions to a Health savings account (HSA) or Archer MSA?

Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?

Did you pay long-term care premiums for yourself or your family?

Did you make any contributions to an ABLE (Achieving a Better Life Experience) account?

Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account?

If you are a business owner, did you pay health insurance premiums for your employees this year?

### Itemized Deduction Information

Did you incur a casualty or theft loss or any condemnation awards during the year?  
If yes, did the loss occur in a Federally declared disaster area?

Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?

Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)?  
If yes, please keep evidence for your records such as a receipt from the donee organization, canceled check, or record of payment.

Did you donate a vehicle or boat during the year?

Did you pay real estate taxes for your primary home and/or second home?

Did you pay any mortgage interest on an existing home loan?

Did you incur interest expenses associated with any investment accounts you held?

Did you make any major purchases during the year (cars, boats, etc.)?

Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax?

Are you or your dependent living in an assisted living or other care facility?

### Other Taxes

**Senior Property Tax Reduction** - if you are 61 or older, own a home in WA and have gross income (including Social Security) of less than \$58,423 you may be eligible.

Would like assistance with this form? (requires completed tax return and separate preparation fee)

**Senior Property Tax Deferral** - if you are 61 or older, own a home in WA and have gross income (including Social Security) of less than \$67,411 you may be eligible.

Would like assistance with this form? (requires completed tax return and separate preparation fee)

### Miscellaneous Information

Did you make gifts of more than \$17,000 to any individual?

Did you utilize an area of your home for business purposes?

Did you engage in any bartering transactions?

Did you retire or change jobs this year?

Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?

Did you pay any individual as a household employee during the year?

Did you make energy efficient improvements to your main home this year?

Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?

Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?

Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?

Did you receive correspondence from the State or the IRS?  
If yes, explain: \_\_\_\_\_

Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?

### Refunds, Direct Debit Payment, and Electronic Filing

If you get a refund, would you like it directly deposited to your bank account?

Would you like to apply your refund to your 2024 estimated payments?

If you owe, would you like to pay via direct debit from your bank account?

### Estimated Payments

Did you make **2023 Federal** quarterly estimated income tax payments?  
If yes, complete Estimated Taxes Worksheet below:

Q1 Payment Date \_\_\_\_\_ Amount \_\_\_\_\_  
Q2 Payment Date \_\_\_\_\_ Amount \_\_\_\_\_  
Q3 Payment Date \_\_\_\_\_ Amount \_\_\_\_\_  
Q4 Payment Date \_\_\_\_\_ Amount \_\_\_\_\_

Did you make **2023 STATE or CITY** quarterly estimated income tax payments?  
If yes, complete State Estimated Taxes Worksheet.  
(Does not apply to State of Washington.)

Would you like to set-up auto-withdrawals for your **2024 Estimated Tax Payments** via direct debit?

**If you are preparing this organizer AFTER April 15, 2024, please complete the following questions.**

Did you send a payments with your **2023 Extension**? If yes, how much? \_\_\_\_\_

Have you made any Federal quarterly estimated payments for 2024?  
If yes, complete the Estimated Taxes Worksheet below:

Q1 Payment Date \_\_\_\_\_ Amount \_\_\_\_\_  
Q2 Payment Date \_\_\_\_\_ Amount \_\_\_\_\_  
Q3 Payment Date \_\_\_\_\_ Amount \_\_\_\_\_

### Retirement Information

Are you an active participant in a pension or retirement plan?

Did you receive any Social Security benefits during the year?

Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

If yes, were any withdrawals due to a Federally declared disaster?

If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2023?

Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

Did you make any qualified charitable distributions (QCD) during the year?

**Be aware, Traditional and Roth contributions are due April 15, 2024. You may withdraw an over contribution by October 15, 2024 if you are on extension.**

Did you contribute to an IRA (not through work)?

Traditional IRA Contributions (T) \_\_\_\_\_ (S) \_\_\_\_\_

Roth IRA Contributions (T) \_\_\_\_\_ (S) \_\_\_\_\_

Are you going to make additional contributions to your Roth or traditional IRA for 2023?

If you have not yet made a contribution, would you like to? Interested in knowing the maximum? Ask us.

If you are self employed did you contribute to a retirement plan?

SIMPLE IRA Contributions (T) \_\_\_\_\_ (S) \_\_\_\_\_

SEP IRA Contributions (T) \_\_\_\_\_ (S) \_\_\_\_\_

KEOUGH Contributions (T) \_\_\_\_\_ (S) \_\_\_\_\_

Did you incur any unreimbursed expenses working as a teacher, aid counselor or principal?

**IN WHICH FORMAT(S) WOULD YOU LIKE TO RECEIVE YOUR CLIENT COPY?**

**PAPER**

**PDF VIA EMAIL**

**PDF VIA PORTAL**

**This QUESTIONNAIRE and ENCLOSED WORKSHEETS have been filled in completely and correctly to the best of my (our) knowledge.**

**Taxpayer Signature** \_\_\_\_\_ **DATE** \_\_\_\_\_

**Spouse Signature** \_\_\_\_\_ **DATE** \_\_\_\_\_

**Primary Contact for Questions:** \_\_\_\_\_