



R3STORE ACCOUNTING
ACCOUNTING, TAX PREPARATION AND TRAINING

2023

Tax Questionnaire

REQUIRED - Complete, sign, and return.

Call 209-7314 or email any questions to info@restoreacct.com

Please complete this brief tax questionnaire and return to us along with your PAPER TAX FORMS AND ANY OTHER PAPER DOCUMENTS.

Please return no later than March 20th, 2024



2023 Tax Questionnaire

NEW for 2024 Tax Meeting Options: (please select one)

- ☐ **Email** - We send an email with final numbers, you will email us back approval to file your taxes.
- ☐ **Zoom** - Meet live via computer & give verbal approval to file you taxes.

Personal Information:

Legal Name: _____ **Spouse Legal Name:** _____

Tax Payer	Spouse (If Applicable)
Social Security:	Social Security:
Date of Birth: / /	Date of Birth: / /
Occupation:	Occupation:
Phone (Cell):	Phone (Cell):
Email Address	Email Address
Marital Status:	Marital Status:

Mailing Address
Address:
City:
State:
Zip Code:

Dependents			
	#1	#2	#3
Name:			
Social Security #:			
Date of Birth:			
Relationship			
How many nights did they spend with you in 2023?			

Tax Forms:

Please send us all tax forms you receive. Below is a snap shot of some of the forms you may receive and why:

ACTION	TAX FORM NAME
Wages - pay for work as an employee	W-2
Interest - money earned on your money	1099 - INT
Dividend - money earned from investments	1099 - DIV
State Refund - If you itemized last year AND you had a refund	1099 - G
Sale of: Stock, Securities, Assets & Crypto Currency	1099 - B
Other Income - Contractor work or income from else where	1099 - MISC / 1099 - NEC ect.
Retirement / Pension Distribution's - Income from retirement	1099 - R
Pass Thru Income - Owner of LLC taxed as S-Corp	Schedule K-1
Partnership, Trust, Estate	
Social Security Income - Sick or Retirement income from government	SSA-1099
Mortgage Interest & Property Taxes Paid on home(s)	1098
Health Savings Account (HSA) - money saved to cover medical	1099 SA and 5498-SA
Health Insurance Purchased from Market place	1095 - A
Student Loan Interest - Loans you paid on for school	1098 - E
Tuition paid to college(s)	1098-T

2023 Tax Questionnaire

***If you answered YES to any of the below questions, please provide us with all related tax forms and more details on the last page of this questionnaire.**

YES * NO

Personal Info

☐ ☐ Did your marital status change during the year?

☐ ☐ Did your address change during the year?

☐ ☐ Did you make any ESTIMATES TAX PAYMENTS to the IRS or STATE GOVERNMENT(S)?

Healthcare

☐ ☐ Did you sign up for healthcare coverage through Marketplace ? If Yes, turn in your FORM 1095-A.

☐ ☐ Did you have a health savings account (HSA) - Forms 1099 SA and/or 5498-SA

Retirement

☐ ☐ Did you receive a distribution from or contribute to a retirement plan (401(k), IRA, etc.)? Forms 5498, 1099R

☐ ☐ Did you transfer/convert or Rollover any amount from one retirement plan to another?

☐ ☐ Did you **early** withdraw from your IRA and or 401K?

Education

☐ ☐ Did you deposit **or** withdraw funds from a Coverdell Education Savings account or Qualified Education Program (Section 529)? And use funds for anything other than qualified education expenses? Supply Form 1099T.

☐ ☐ Did you, spouse, or child incur any tuition expenses that are required to attend a college, or vocational school? If so, include Form 1098T.

☐ ☐ Did you pay any student loan interest? If so, include Form 1098TE.

Investments

☐ ☐ Did you or your spouse sell any Investments such as Stock, Bonds and/or securities.
Include **ALL** Pages. For **large accounts**, export the info into an **excel** please send us **BOTH** the excel and pdf

☐ ☐ Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

☐ ☐ Did you or your spouse start, purchase, or sell a business, rental property, or farm, or acquire/sell any interest

☐ ☐ Did you receive (as a reward, award, or payment for property or services); or sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Digital assets include NFTs as well.
Companies who perform these type of transactions: • Coinbase • Robinhood • Kraken • BitForex • Finance

Credits / Business

☐ ☐ Did you make any qualifying energy efficient home improvements such as solar or electronic car charger

☐ ☐ Did you purchase an electric and/or Hybrid vehicle in 2023?

☐ ☐ Do you have a (home/condo/apartment/Airbnb) property that you rented in 2023?

☐ ☐ Did you start a new business in 2023?

Dependents

☐ ☐ Can you be claimed as a dependent on another person's tax return?

☐ ☐ Were there any changes in dependents? **New child, child move out?**

☐ ☐ Did any of your dependent(s) earn income from work **over \$13,850?**

2023 Tax Questionnaire

Additional Income

<u>Income From</u>	<u>Amount</u>
Alimony Income - Received	
Unemployment Income	
Social Security Income	
Gambling Income	
Gambling LOSS	
Other: _____	
Other: _____	

Deductions and Credits

<u>Descriptions</u>	<u>Amount</u>	
Medical Copays *		* Please do NOT send us receipts we only req
Medical Prescriptions *		* Please do NOT send us receipts we only req
Dental Expense *		* Please do NOT send us receipts we only req
Hospitals & Medical Centers *		* Please do NOT send us receipts we only req
Medical Mileage *		* Please do NOT send us receipts we only req
Charitable Contributions - CASH *		*MUST have receipts to claim
Charitable Contributions - NON- CASH*		*MUST have receipts to claim

* Although RESTORE ACCOUNTING does not require the receipts to be turned in with your documents, the IRS requires you to retain these receipts for 7 years.

Additional Information (please add below)

Return this form and all Tax Documents by March 20th, 2024

Tax Payer Signature

Date

Spouse Signature

Date