



2023 TAX RETURN QUESTIONNAIRE & CHECKLIST

Name: _____ Date: _____

Please review the following questions. If you answer yes to any of the questions, please provide details

PERSONAL INFORMATION

Y N

Did your name, address, telephone number or e-mail address change during the year?

Did your marital status change during the year?

Please list your current occupation _____ and your spouse's _____

If you have an overpayment do you want the funds deposited in your Bank Account?

If you owe a balance due, do you want funds electronically drafted from your account?

Please provide banking info:

Bank Name: _____

Check one:

Account Number: _____

Checking

Routing Transit Number: _____

Savings

If filing a joint return, please circle the owner of this account Taxpayer Spouse Joint

Did you upload to us a copy of your (and your spouse's) driver's license?

IMPORTANT

Please provide a document, record, letter, or statement from a 3rd Party for proof to receive Child Tax Credits/other Credits (3rd Party = School, Doctor, Daycare, Insurance, Pastor, Landlord, Social Services)

Upload docs to: https://login.atomanager.com/atom_anc/WebInfo.aspx

Is this the first year we are preparing your Tax Returns? If so, please provide us:

- Prior Year's Tax Return
- Any Federal/State Tax Correspondence you received

Did you have any foreign income or pay any foreign taxes?

Did you pay or receive Alimony? If yes, please provide amount:

TAXES, CHARITY, MEDICAL, MORTGAGE INTEREST**Y****N**

Did you pay Mortgage Interest? If yes, please provide form 1098

Did you pay Local Real Estate Taxes? If yes, please provide total taxes paid _____

Did you make Cash contributions to Church, Charity, or other IRS recognized 501-C-3 organization? If yes, please itemize; attach separate sheet if necessary.

Charity Name	Amount (\$)	Charity Name	Amount (\$)

Did you pay out of pocket medical or dental expenses during the year?*

Did you pay any long term care premiums for yourself, or your spouse?*

Did you pay for self employed health insurance out of your business?*

* Please provide details on separate page.

ESTIMATED TAXES**Y****N**

Did you make any estimated tax payments for the tax year? If yes, please list all amounts and dates paid for federal & state estimated tax payments made. (Estimated quarterly payments are not Payroll Tax Payments)

	FEDERAL		RESIDENT STATE	
	Date Paid	Amount (\$)	Date Paid	Amount (\$)
Overpayment applied from prior year return				
First Quarter				
Second Quarter				
Third Quarter				
Fourth Quarter				

PURCHASES, SALES AND DEBT**Y****N**

Did you purchase a new or used business vehicle? If yes, please provide purchase receipt.

Did you purchase an EV (Electric Vehicle) in 2023?

If yes, provide VIN number, year, make, model and pricing info on a separate sheet.

Did you buy or sell any stocks, bonds or other investment property?

Did you make energy efficient home improvements in 2023?

If yes, provide details on a separate sheet.

Does anyone owe you money on a business loan that has become uncollectible?

Did you purchase, sell or refinance your principal home, second home or rental property?

Did you engage in the trade of cryptocurrency (i.e receive, exchange, sell or acquire)

Did you start a new business during the year? If yes, please download and complete "Business Worksheet" at <https://anchoraccountingandtax.com/forms/>

Did you have any debts cancelled or forgiven (e.g., credit card, mortgage)?

RETIREMENT PLANS**Y****N**

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE)?

Did you contribute to

IRA

Roth IRA

SEP?

If yes, Taxpayer Amount: _____

Spouse's Amount: _____

SHARING ECONOMY**Y****N**

Did you receive income or incur expenses associated with car sharing (Lift, or Uber)?

Upwork

Airbnb

Crowdfunding

Fashion Sharing Sites

Other _____

EDUCATION**Y N**

Did you receive funds from an Education Savings Account or a Qualified Tuition Program?

Did you contribute to a 529 plan(s)?

If yes, how much did you contribute for each child? If so, please mention

Name	Amount	Social Security Number

Did you, your spouse or a dependent incur tuition expenses to attend college? If yes, please include Form 1098-T from the college.

Did you purchase any required text books or pay any required fees?

Do you pay student loan interest? Please include your 1098-E

Did you incur any expenses working as a teacher, counselor, or principal for classes K-12?

 CHILD CARE**Y N**

Did you pay for childcare or daycare? If yes, please provide with

Names of Dependents	Names of Providers & Address	Amount Paid	SSN

DEPENDENTS**Y N**

Could you be claimed as dependent on another person's tax return?

Were there any changes in your dependents compared to last year? If so, please provide:

Dependent Name:	Months lived at home:	SSN:	DOB:

Did all of your dependents live with you 6 months or more?

Can another person qualify to claim any of your dependents?

 MISCELLANEOUS**Y N**

Did you receive any Schedule K-1(s) from Partnership(s), S-Corp(s), Estate(s), Trust(s), etc.?

Were you and all your dependents covered by health insurance all year?

 Please provide all Forms 1095-A, 1095-B or 1095-C received for ALL household members
Note: health coverage info is still required on many state tax returns.

Have you contributed to a Health Savings Account? Please provide Form 1099-SA

Did you have any financial interest in, or signature authority over a foreign account? (i.e. stocks, bonds, mutual funds, partnerships, interests, etc.) held in foreign financial institutions that exceeded \$10,000 in value at any time during the year?

If yes, please provide an account statement.

Do you own any rental property? If yes, please download and complete "Rental Property Worksheet" at www.anchoraccountingandtax.com/forms Do you own a small business and/or earn self employment income? If yes, please download and complete "Business Worksheet" at www.anchoraccountingandtax.com/forms

Did you purchase merchandise (either online, or by telephone, or by direct mail) from an out-of-state supplier/vendor, and pay no sales tax?

Have you ever been denied an earned income credit or child tax credit by the IRS?

Do you have any gambling winnings? If yes, Please include Form W2-G

To the best of my knowledge the information enclosed in this document is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Taxpayer_____
Date_____
Spouse_____
Date

Include all copies of the Following

TAX DOCUMENTS RECEIVED FOR 2023

FORMS CHECKLIST	
W-2(s)	<input type="checkbox"/>
1099-INT <i>Interest Income</i>	<input type="checkbox"/>
1099-DIV <i>Dividends</i>	<input type="checkbox"/>
1099-B <i>Sale of Stocks</i>	<input type="checkbox"/>
1099-G <i>State or Local Refunds / Unemployment Compensation</i>	<input type="checkbox"/>
1099-K <i>Payment Card and Third Party Network Transactions</i>	<input type="checkbox"/>
1099-R <i>Retirement Distributions</i>	<input type="checkbox"/>
1099-C <i>Cancellation of Debt</i>	<input type="checkbox"/>
1099-MISC <i>Miscellaneous Income</i>	<input type="checkbox"/>
1099-Q <i>Qualified Education Programs</i>	<input type="checkbox"/>
1099-S <i>Sale of Real Estate</i>	<input type="checkbox"/>
1099-SA <i>Distributions from an HSA Archer MSA, or Medicare Advantage MSA</i>	<input type="checkbox"/>
1099-SSA <i>Social Security Statement</i>	<input type="checkbox"/>
1098-E <i>Student Loan Interest</i>	<input type="checkbox"/>
1098-T <i>Tuition Statement</i>	<input type="checkbox"/>
1098 <i>Mortgage Interest Statement Banks or Individuals</i>	<input type="checkbox"/>
W-2G <i>Gambling Winnings</i>	<input type="checkbox"/>
1095-A, B or C <i>Health Insurance Statement</i>	<input type="checkbox"/>