

2023 TAX YEAR – TAXPAYER QUESTIONNAIRE

Updated 1/19/2024

Last Name: _____

Last 4# SSN: _____

ADDITIONAL PERSONAL INFORMATION

Were you **UNDER 24** at the end of 2023 and a full-time student for at least 5 months in 2023? **YES** or **NO**

If so, was your parent(s)'s home your permanent address? **YES** or **NO**

Are you Retired? **YES** or **NO**

Totally and Permanently Disabled? **Yes** or **No** **Year of Disability:** _____

Do you need to file **INJURED SPOUSE**? **YES** or **NO** If so, who is the person with the debt? _____

STATE RESIDENCY

What county do you live in? _____ What school district are you in? _____

Did you **move from one state to another in 2023**? **YES** or **NO**

If so, which state did you live in on January 1, 2023? _____ Date you moved. _____ State you moved to? _____

Did you move states again in 2023? **YES** or **NO** **What county at the end of 2023?** _____

WV: If you are 65 or older, do we need to claim your Senior Citizen's Tax Credit (for Property Tax)? **YES** or **NO**

PA: Did you have any unreimbursed job expenses in 2023? **YES** or **NO** If so, how much \$ _____

DIRECT DEPOSIT – DO NOT use a deposit slip for the information below

Name of Bank: _____ **Type of Account:** _____ Checking _____ Savings _____ Savings Bond _____ United States

Routing Number _____ **Account Number:** _____
First 9 digits at the bottom of check Right of the routing number

INCOME

Do you have a **1099-MISC or 1099-NEC**? **YES** or **NO** If so, what is it for? _____

If you have expenses against this income, what are your expenses **not including mileage**? _____

If you have mileage expense, how many **total miles** did you drive total in 2023? _____

How many miles were **Commuting miles** (back & forth to the same place every day)? _____

How many miles were **Business miles**, not including commuting miles? _____

EXPENSES

If you are a **K – 12 TEACHER**, and spent unreimbursed personal money on classroom supplies in 2023 how much? _____

If your spouse also qualifies, answer the same question for your spouse _____

If you paid **Long Term Care Insurance**, how much did you pay in 2023? **You:** \$ _____ **Spouse:** \$ _____

If you pay or receive **Alimony** what was the Year of divorce? _____ Check whether you Pay or Receive

How much total in 2023? _____ What is the other person's SSN? _____

QUALIFIED SAVINGS PLANS

How much did you contribute to a **College 529 savings plan**? _____

Did you contribute to a **Traditional IRA** for the 2023 tax year? If so, how much: **YOU:** \$ _____ **SPOUSE:** \$ _____

Did you contribute to a **ROTH IRA** for the 2023 tax year? If so, how much: **YOU:** \$ _____ **SPOUSE:** \$ _____

OTHER

Do you have **Short Term Capital Loss** carryover from 2022? If so, how much \$ _____

Do you have **Long Term Capital Loss** carryover from 2022? If so, how much \$ _____

If you paid **ESTIMATED FEDERAL or STATE TAXES** check here and list dates with amounts for each on the back.