Tax Questionnaire for Year 2023

This questionnaire should be used as a guide to organizing your materials prior to your tax interview. Rental activity and/or business income and expense should be prepared on separate schedules.

|  |  |
| --- | --- |
|  | Taxpayer Spouse Dependents |
| Name |  |
| Date of Birth |  |
| Social Security # |  |
| Address |  |
| Phone | Home Work (Taxpayer) Work (Spouse)  Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell (Taxpayer) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell (Spouse)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |

**Wages and Salaries** (Attach ALL copies of **W-2** **forms**)

**Pensions and Annuities** (Attach ALL copies of **Form 1099-R**)

**Interest Income – Taxable & Nontaxable** (Attach ALL copies of **Form 1099-INT**)

|  |  |  |  |
| --- | --- | --- | --- |
| Source | Amount | Source | Amount |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Dividends Received** **– Taxable & Nontaxable** (Attach ALL copies of **Form 1099-DIV**)

|  |  |  |  |
| --- | --- | --- | --- |
| Company | Amount | Company | Amount |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Income from Businesses, Farms & Rental Properties** (Attach schedule of income/expense)

**Capital Gains & Losses** (Attach ALL **1099-B forms** and **1099-S forms**) – Please provide a detailed schedule showing purchase date, sale date, selling price, and cost. Generally, your broker will be able to provide this information for you.

**Income from Partnerships, S-Corporations, Trusts & Estates** (Attach copy of **K-1** form)

|  |  |  |
| --- | --- | --- |
| **Amount of:** | Taxpayer | Spouse |
| **Unemployment Compensation Received** (Attach **1099 forms**) |  |  |
| **Social Security & Railroad Retirement Received** (Attach **1099 forms**) |  |  |
| **2023 Roth IRA Conversions** (Attach **1099R forms**) | \_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_ |

**All Other Income** (Fees, Prizes, State Tax Refund, ADC Payments, Gambling Winnings, child support, etc.)

|  |  |  |  |
| --- | --- | --- | --- |
| Nature | Amount | Nature | Amount |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Educator Classroom Supplies Purchased in 2023**

**Alimony** – Amount Name and Social Security Number

**Child Care Provider Information**

Name & Address Social Security Number Amount Paid

|  |  |  |  |
| --- | --- | --- | --- |
| **Medical and Dental (Unreimbursed):** | Amount |  | Amount |
| Medicine & Drugs (Enter Total Only) |  | Medical Travel \_\_\_ mi.@ 22¢ |  |
| Health Insurance Premiums |  | Doctors |  |
| Medicare Premium, if any |  | Hospitals |  |
| Long-Term Care Premiums T-\_\_\_\_\_\_\_\_ S- |  | Glasses, Hearing Aides, etc. |  |

**Taxes:**

Real Estate Taxes Paid in 2023 on your home, vacation home, and other non-business property

Other (Sales Tax, License Plate Fees, etc.)

|  |  |  |  |
| --- | --- | --- | --- |
| **Interest Expense:** | Amount |  | Amount |
| Home Mortgage Interest - Residence |  | Investment Interest |  |
| Home Mortgage Interest - Second Home |  | Student Loan Interest |  |
| Private Mortgage Insurance |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Contributions:** | Amount |  | Amount |
| Charitable Work Travel mi. at 14¢ |  | Automobile, Boat or Airplane (Form 1098-C) |  |
| Churches |  | Non-Cash Items (Attach List) |  |
| All Others |  |  |  |

**Business Travel & Entertainment** – I (We) maintain adequate records for auto, travel and entertainment.

If yes, please sign here

**College Tuition, Fees, Books, & Supplies** - Attach Form 1098-T, enrollment date, college, amounts and dates paid.

**Health Savings Account**  – 2023 Contributions (Attach **Form 5498SA**) \_\_\_\_\_\_\_\_\_\_\_\_

2023 Distributions (Attach **Form 1099SA**) \_\_\_\_\_\_\_\_\_\_\_\_\_

**Forms 1095-A, 1095-B, and 1095-C**  – Please attach applicable Health Insurance Form(s) to verify coverage

|  |  |  |
| --- | --- | --- |
| **2023 Individual Retirement Account (IRA) Deduction** | Taxpayer | Spouse |
| Amount |  |  |
| Date Deposited |  |  |
| Are you covered under your employer’s retirement plan? |  |  |
| “Regular” IRA or “Roth” IRA |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | **Estimated Income Tax Data** | | | | | |
|  | Date | Federal | | Michigan | | Michigan Business Tax | |
|  | Due | Date Paid | Amount | Date Paid | Amount | Date Paid | Amount |
| 2022 Overpayments |  |  |  |  |  |  |  |
| Credited to 2023 |  |  | $ |  | $ |  | $ |
| 1st Installment | 4/18/23 |  |  |  |  |  |  |
| 2nd Installment | 6/15/23 |  |  |  |  |  |  |
| 3rd Installment | 9/15/23 |  |  |  |  |  |  |
| 4th Installment | 1/16/24 |  |  |  |  |  |  |
| Totals |  |  | $ |  | $ |  | $ |

**State**:

School District Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Are you a disabled veteran? \_\_No \_\_ Yes % Disability

Taxable Value of Personal Residence

Real Estate Taxes Levied in 2023 on your home Total Heating Costs Type of Fuel

Rent Paid on your home in 2023 Landlord’s Name & Address

Total purchases of mail order items that you have not paid sales tax on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contributions to MET or MESP Accounts \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_