



Accurate Tax & Accounting, Ltd.

2022 Tax Questionnaire (the "Purple Sheet")

NAME: _____

E-MAIL ADDRESS: _____

DURING 2022, DID EITHER YOU AND/OR YOUR SPOUSE...

IF ANY "YES" ANSWERS - PLEASE EXPLAIN

	YES	NO
Become legally blind, adopt, marry, divorce, have any births OR deaths in your IMMEDIATE family?.....	<input type="checkbox"/>	<input type="checkbox"/>
Live with anyone other than your spouse or dependent child/children or support anyone else?.....	<input type="checkbox"/>	<input type="checkbox"/>
Have any children under age 19 or a full-time student under age 24 with UNEARNED income more than \$2,300 ?.....	<input type="checkbox"/>	<input type="checkbox"/>
Reached age 72 or older AND currently have IRA's?.....	<input type="checkbox"/>	<input type="checkbox"/>
Make or receive any gifts over \$16,000 to or from any one individual? (If "YES", a Gift Tax return may be necessary).....	<input type="checkbox"/>	<input type="checkbox"/>
Hold any US Savings Bonds that were issued in 1992 or earlier?. If yes, you need to redeem them	<input type="checkbox"/>	<input type="checkbox"/>
At any time in 2022, did you: (a) receive (as a reward, award, or payment for properly or services), OR (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in CRYPTO)?.....	<input type="checkbox"/>	<input type="checkbox"/>
Did you have a financial interest in or signature authority over a financial account or assets in a foreign country?.....	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?.....	<input type="checkbox"/>	<input type="checkbox"/>
Did you own property in a foreign country?.....	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any income from, or pay taxes to, a foreign country that's not in a brokerage account?.....	<input type="checkbox"/>	<input type="checkbox"/>
Did the aggregate value of your foreign accounts exceed \$10,000 at ANY time during the year?.....	<input type="checkbox"/>	<input type="checkbox"/>
Wish \$3 to go to the Presidential Election Campaign Fund?.....	<input type="checkbox"/>	<input type="checkbox"/>
Your spouse (if applicable) wish \$3 to go to the Presidential Election Campaign Fund?..... (It will NOT decrease your refund nor increase your tax due)	<input type="checkbox"/>	<input type="checkbox"/>
Start a business or purchase rental property? (If "YES", fill out worksheet & provide details of purchase)	<input type="checkbox"/>	<input type="checkbox"/>
Receive any disability income (excluding Social Security) during the year ?.....	<input type="checkbox"/>	<input type="checkbox"/>
Buy or sell any real estate? (If "YES", we need your "Settlement/Closing" documents).....	<input type="checkbox"/>	<input type="checkbox"/>
Abandon or have any real estate foreclosed on during the year?.....	<input type="checkbox"/>	<input type="checkbox"/>
Have any debts that were cancelled, forgiven, a "short sale", bankruptcy?.....	<input type="checkbox"/>	<input type="checkbox"/>
Receive any Social Security benefits during the year? If yes, be sure to provide the 1099.....	<input type="checkbox"/>	<input type="checkbox"/>
Receive any "TIP" income not reported to your employer? Amount \$ _____	<input type="checkbox"/>	<input type="checkbox"/>
Have income or loss from an estate (inheritance) or trust? (If "YES", we may need Form K-1).....	<input type="checkbox"/>	<input type="checkbox"/>
Have income or loss from Partnerships or S Corporations? (If "YES", we will need Form K-1).....	<input type="checkbox"/>	<input type="checkbox"/>
Receive any gambling income from ANY state? Provide details (if "YES" we may need to file for that state).....	<input type="checkbox"/>	<input type="checkbox"/>
Hold or receive any "tax free" interest from municipal bonds and/or mutual funds? We will need statements.....	<input type="checkbox"/>	<input type="checkbox"/>
Sell or exchange any stocks/mutual funds OR hold any investments that became worthless? Need Statements.....	<input type="checkbox"/>	<input type="checkbox"/>
Receive forgiveness on a qualifying federal student loan? (If "Yes", we will need the amount forgiven).....	<input type="checkbox"/>	<input type="checkbox"/>
Contribute to a ROTH or TRADITIONAL IRA or SELF-EMPLOYED RETIREMENT PLAN ? (NOT through employer).....	<input type="checkbox"/>	<input type="checkbox"/>
Withdraw from any ROTH or TRADITIONAL IRA or ANY RETIREMENT ACCOUNT FUNDS ? INCLUDE 1099R.....	<input type="checkbox"/>	<input type="checkbox"/>
Convert money from a TRADITIONAL IRA to a ROTH or from a ROTH to a TRADITIONAL IRA ?.....	<input type="checkbox"/>	<input type="checkbox"/>
Take a distribution from your IRA for a qualified charitable deduction (QCD)? (If "YES", please provide info)	<input type="checkbox"/>	<input type="checkbox"/>
Take retirement funds out in 2020 due to Covid, and elected to spread over 3 years?.....	<input type="checkbox"/>	<input type="checkbox"/>
Receive income or incur expenses associated with: Uber, Lyft, GrubHub, Doordash, InstaCart, kickstarter, etc. OR Airbnb, VRBO, Home Away? (If "YES," provide form 1099-NEC, 1099-MISC, 1099-K, or other docs and expenses).....	<input type="checkbox"/>	<input type="checkbox"/>

2022 Tax Questionnaire (cont'd)

	<u>YES</u>	<u>NO</u>
Claimed the "First Time Homebuyer Credit" in 2008, and continue to pay back the credit?.....	<input type="checkbox"/>	<input type="checkbox"/>
Purchase a new electric vehicle OR install solar, wind, geo thermal to your main home?.....	<input type="checkbox"/>	<input type="checkbox"/>
Pay wages to any household employees (babysitter, nanny, housekeeper etc.)?.....	<input type="checkbox"/>	<input type="checkbox"/>
Pay tuition for any classes beyond high school for you or any family member who appears on your tax return?.....	<input type="checkbox"/>	<input type="checkbox"/>
(If "YES", please provide Form 1098-T as well as the billing account activity statement for 2022)		
Make any contribtions to an HSA that was not through payroll deduction?	<input type="checkbox"/>	<input type="checkbox"/>
Have your employer deduct any child care expenses from your wages on a PRE-TAX basis? Provide daycare info.....	<input type="checkbox"/>	<input type="checkbox"/>
Have any member of your household with health coverage via "The Marketplace"? (gov. subsidized premiums).....	<input type="checkbox"/>	<input type="checkbox"/>
(If "YES", we will need copies of all Forms 1095-A)		
Make any contribtions to an HSA that was not through payroll deduction?	<input type="checkbox"/>	<input type="checkbox"/>
Use any of your HSA for medical purposes? If yes, provide distribution 1099-SA.....	<input type="checkbox"/>	<input type="checkbox"/>
A victim of " tax-related " identity theft in 2022 or an earlier year?.....	<input type="checkbox"/>	<input type="checkbox"/>
Receive an "IP PIN" from the IRS? (If "YES", please provide your most recent IRS CP01A Letter).....	<input type="checkbox"/>	<input type="checkbox"/>
Receive an "IP PIN" from the State of Wisconsin? (If "YES", please provide your most recent WDOR IP PIN Letter).....	<input type="checkbox"/>	<input type="checkbox"/>
"ONLY IF YOU CAN ITEMIZE" (SOME WI residents could use the following on their WI return, except sales tax)		
Purchase a car, motorcycle, boat or RV during 2022? (If "YES", please provide the amount of sales tax paid).....	<input type="checkbox"/>	<input type="checkbox"/>
Contribute property such as used clothing, furniture, toys, etc. having an aggregate value of \$500 or more to a charitable organization (If "YES", additional documentation is required).....	<input type="checkbox"/>	<input type="checkbox"/>
Donate a vehicle or boat? (If "YES", we need you 1098-C).....	<input type="checkbox"/>	<input type="checkbox"/>
Refinance your home in 2022 (we MAY need your closing papers).....	<input type="checkbox"/>	<input type="checkbox"/>
WISCONSIN RESIDENTS ONLY		
Make any purchases from out-of-state firms that did NOT collect any sales tax?.....	<input type="checkbox"/>	<input type="checkbox"/>
(If "YES", please provide the amount of these purchases \$_____)		
Pay the cost of ANY medical, dental, vision or other health care insurance premiums, (this DOES include Medicare Part B/D, supplemental, OR any premiums deducted from your pension or paycheck). DO NOT include any premiums paid with HSA /reimbursed/or pre tax funds.....	<input type="checkbox"/>	<input type="checkbox"/>
Pay premiums for a long-term health care policy?.....	<input type="checkbox"/>	<input type="checkbox"/>
(If "YES", please indicate amounts paid - Taxpayer \$_____ Spouse \$_____)		
Pay any private school tuition for your child in grades K-12? (If "YES", please provide the school tuition receipt).....	<input type="checkbox"/>	<input type="checkbox"/>
Pay home mortgage interest secured by a 2nd home located OUTSIDE the State of Wisconsin?.....	<input type="checkbox"/>	<input type="checkbox"/>
Contribute to WI EdVest and/or Tomorrows Scholar fund? (If "YES", we will need year end statement(s).....	<input type="checkbox"/>	<input type="checkbox"/>
Wish to make a donation to any WI state designated charitable programs? Please provide how much and to whom	<input type="checkbox"/>	<input type="checkbox"/>
(If "YES", it WILL increase your tax due or decrease your refund)		
ILLINOIS RESIDENTS ONLY		
Keep track of the sales and use tax owed on purchases from out-of-state?.....	<input type="checkbox"/>	<input type="checkbox"/>
(If "YES", please provide the amount of purchases \$_____)		
(If "NO", we will use the table provided by IDOR to estimate the amount)		
Pay more than \$250 for your child's academic education in grades K-12? (If "YES", please provide details).....	<input type="checkbox"/>	<input type="checkbox"/>
Contribute to an IL 529 Educational Plan (i.e., Bright Start and/or Bright Directions)?	<input type="checkbox"/>	<input type="checkbox"/>
(If "YES", please provide details and amount \$_____		
Wish to make a donation to any IL state designated charitable programs? Please provide how much and which one.	<input type="checkbox"/>	<input type="checkbox"/>
(If "YES", it WILL increase your tax or decrease your refund).....		