



2023 Tax Questionnaire (the “Purple Sheet”)

NAME _____

EMAIL _____

DURING 2023, DID EITHER YOU AND/OR YOUR SPOUSE.....

Become legally blind, adopt, marry, divorce?	[] YES [] NO
Live with anyone other than your spouse or dependent child/children or support anyone else?	[] YES [] NO
Have a dependents that had “Gross Income” of over \$1,250 (\$400 if self employed)?	[] YES [] NO
Make or receive any gifts over \$17,000 to or from any one individual? If YES, a gift tax return may be need to be filed.	[] YES [] NO
Hold any U.S. savings bonds that were issued in 1993 or earlier? If YES, you must report the interest.	[] YES [] NO
Wish \$3 to go to the Presidential Election Campaign Fund?	[] YES [] NO
Your spouse (if applicable) wish \$3 to go to the Presidential Campaign fund?	[] YES [] NO
At anytime, did you (a) receive (as a reward, award, or payment for property or services), OR (b) sell, exchange, gift, or otherwise dispose of a digital asset (or financial interest in digital asset) at ANY time in 2023? Important: if NO, you are certifying that you had no virtual currency transactions.	[] YES [] NO
Have any assets, accounts or interest in or a signature authority over a financial account in a foreign country including a bank, trust, online gambling, virtual currency or other financial account that had a value of \$10,000 or more at ANY time in 2023	[] YES [] NO
Start a business or purchase rental property? If YES, fill out wks. / provide tax bill & closing papers.	[] YES [] NO
Have any registered Limited Liability Company (LLC), Corporation, or S Corporation in any state? If YES, have you reported your Beneficial Ownership Information (BOI) with FinCEN?	[] YES [] NO [] YES [] NO
Buy, sell or refinance any real estate ? If YES, please bring your closing documents.	[] YES [] NO
Involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled? If YES, we will need complete details and tax forms you received,	[] YES [] NO
Receive any disability income, OTHER THAN Social Security, during 2023?	[] YES [] NO
Receive any Social Security benefits during the year? If YES, be sure to provide the 1099 from SSA.	[] YES [] NO
Receive any “TIP” income NOT reported to your employer? If YES, amount \$_____.	[] YES [] NO
Have income or loss from an estate (inheritance) or trust? If YES, we may need Form K-1.	[] YES [] NO
Have income or loss from Partnerships or S Corporations? If YES, we will need Form K-1	[] YES [] NO
Receive any gambling income from ANY state? Provide details. We may need to file for that state.	[] YES [] NO
Contribute to a ROTH or Traditional IRA or SEP — over and above any employer plans?	[] YES [] NO
Take a distribution from your ROTH IRA AND you were under 59 1/2 or had a Roth IRA for less than 5 years at the time of the distribution? If YES, please provide details of your Roth contribution basis.	[] YES [] NO
Convert money from a TRADITIONAL IRA to a ROTH IRA ? If YES, please include details.	[] YES [] NO
Did you process a “Qualified Charitable Distribution” (QCD) from your Traditional IRA account? If YES, please bring your transaction papers from your IRA to the charitable organization.	[] YES [] NO
Receive income or incur expenses associated with Uber, Lyft, Grubhub, DoorDash, InstaCart, Kickstarter, AirBNB, VRBO, Home Away? If YES, please provide 1099’s and /or other doc’s and expenses.	[] YES [] NO

2023 Tax Questionnaire (cont'd)

Claimed the "First Time Homebuyer " Credit in 2008, and continue payback the credit? (last year?)	[] YES [] NO
Purchase any energy star qualified Clean Energy Improvements (ie: solar) or residential improvements (ie: windows, doors, insulation, furnace, energy audit, etc.)? Please bring details and receipts.	[] YES [] NO
Purchase a qualified electric vehicle (EV)? Please provide INVOICE, VIN, and dealer's certification.	[] YES [] NO
Pay wages to any household employees (babysitter, nanny, housekeeper)?	[] YES [] NO
Pay tuition for any classes beyond high school for you or any family member who appears on your tax return? If YES, please provide Form 1098-T as well as the billing account activity statement for 2023 that shows payments by you, loans, grants, and scholarships. You may need to get this info online.	[] YES [] NO
You make any contributions to a qualified Health Savings Account (HSA)? Please bring Form 1099-SA or Form 5498-SA you received. <i>This is not a flexible savings account (FSA) through your employer.</i>	[] YES [] NO
Take any distributions (swipe your card) from your HSA? If YES, check here if you CERTIFY all distributions were used for qualified medical expenses.	[] YES [] NO <input type="checkbox"/>
Have your employer deduct any child care expenses from your wages on a PRE TAX basis? Please provide day care info.	[] YES [] NO
ANY member of your HOUSEHOLD have health insurance coverage via "The Marketplace" for any months in 2023 (for even one month)? If YES, we will need copies of ALL Forms 1095-A.	[] YES [] NO
Receive an "IP PIN" from the IRS and/or Wisconsin Dept of Revenue? If YES, please provide your most recent PIN letter.	[] YES [] NO
Purchase a vehicle, motorcycle, boat, RV, during 2023 (if you can itemize)?	[] YES [] NO
Contribute property such as used items (clothing, furniture, vehicle etc.) having an aggregate value of \$500 or more? If YES, please provide required documentation. (1098-C if a vehicle/boat). Itemizers only.	[] YES [] NO
Pay the cost of ANY medical, dental, drug, vision or other health care PREMIUMS with "After Tax" dollars? This DOES include Medicare B & D, supplemental, OR any premiums deducted from your pension or paycheck?	[] YES [] NO
Pay any premiums for Long Term Care health care policy? If YES, bring amount paid for each individual.	[] YES [] NO
WISCONSIN RESIDENTS ONLY	
Make any purchases from out-of-state that did NOT collect sales tax? If YES, please provide the amount you paid. If NO, you are certifying you do not owe any sales or use tax.	[] YES [] NO
Pay any private school tuition for your child in grades K-12? If YES, provide school tuition receipt.	[] YES [] NO
Pay any mortgage interest secured by a 2nd home located OUTSIDE of Wisconsin?	
Contribute to EdVest and/or Tomorrows Scholar fund? If YES, we need year end statements.	[] YES [] NO
ILLINOIS RESIDENTS ONLY	
Keep track of sales and use tax owed on purchases from out-of-state? If YES, please provide the amount of purchases. \$ _____ If NO, we will use the table provided by IDOR to estimate the amount.	[] YES [] NO
Pay more than \$250 for your child's academic education in grades K-12? If YES, please provide details.	[] YES [] NO
Contribute to a Bright Start/Bright Directions (529) ? If YES provide year end statements.	[] YES [] NO

THANK YOU! BRING WITH YOU FOR YOUR TAX APPT. OR WHEN DROPPING OFF. You just saved \$10!