

Tax Filing Questionnaire

- Who is filing?
 - Name _____
 - Date of Birth _____
 - SSN _____
 - Phone Number _____
 - E-Mail _____
- Spouse?
 - Name _____
 - Date of Birth _____
 - SSN _____
 - Phone Number _____
 - E-Mail _____
- What tax years do you need filed?
 - 2024 _____
 - 2023 _____
 - 2022 _____
 - Prior _____
- Has your marital status changed?
 - Date _____
 - Change _____
- Did you have any children
 - Name _____
 - Date of Birth _____ ___ Son ___ Daughter ___ Other _____
 - SSN _____
 - Name _____
 - Date of Birth _____
 - SSN _____
 - Name _____
 - Date of Birth _____
 - SSN _____
- Has your address changed?
 - Date _____
 - Address _____
 - Closing statement _____
- Did you purchase a new vehicle/boat/trailer/camper/RV?
 - Date _____
 - Bill of sale _____
- Do you have medical insurance?
 - Furnished by employer _____
 - Purchased through market place _____
 - Form 1095-a _____
 - Insurance card _____

- Did you work for someone/ a company?
 - W-2 _____
 - 1099 _____
- Did your spouse work for someone/ a company?
 - W-2 _____
 - 1099 _____
- Did you receive un-employment?
 - 1099G _____
- Did your spouse receive un-employment?
 - 1099G _____
- Did you receive Social Security benefits?
 - 1099SA _____
- Did your spouse receive Social Security benefits?
 - 1099SA _____
- Did you receive any retirement income?
 - 1099R _____
- Did your spouse receive any retirement income?
 - 1099R _____
- Did you start a business?
 - Financial information _____
 - Do you want us to compile your receipts into financial data? _____
- Do you have a small business?
 - Financial information _____
 - Do you want us to compile your receipts into financial data? _____
- Do you own a farm?
 - Financial information _____
 - Do you want us to compile your receipts into financial date? _____
- Do you have any a rental income?
 - Financial information _____
 - Do you want us to compile your receipts into financial date? _____
- Do you have a mortgage?
 - 1098 _____
 - Property tax statement _____
- Do you have any medical expenses?
 - Doctors _____
 - Hospital _____
 - Medication _____
 - Premium _____
 - Mileage _____
- Do you have any charitable donations?
 - Contribution statement _____
 - Clothing or goods _____

- Did you contribute to a retirement account?
 - 401k _____
 - IRA _____
 - Roth IRA _____
- Did you repay any student loans?
 - 1098E _____
 - December/January statement _____
- Are you or a dependent currently in college?
 - 1098T _____
 - Books _____
 - Computer _____
 - Other expenses _____
- Did you use a college fund to pay for school?
 - Cloverdale 1099Q _____
 - 529 plan 1099Q _____
 - EE Savings bonds 1099int _____
- Did you pay for childcare?
 - Name _____
 - SSN _____
 - Amount _____
 - Dependent Name _____
- Do you have a separate Entity Tax ID
 - Yes _____
 - No _____
- Do you need us to complete the Beneficial Owner Information registration
 - Yes _____
 - No _____
 - Need more information _____

- Do you want to receive your refund direct deposit?
 - Bank Account Number _____
 - Routing Number _____
 - Type Checking / Saving _____
- How did you hear about Ray County Accounting & Tax?
 - Facebook _____

 - Website _____

 - Referral _____

 - Other _____

What questions do you have?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____



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