

Haukeness Tax & Accounting Inc

2023 Client Questionnaire

RENTERS

OFFICE USE ONLY - DATE DROPPED OFF & CLIENT NOTES:

Yes No - Did you pay rent to live at your personal residence during 2023 in Wisconsin?
 Monthly Rent Paid in 2023: _____
 Number of Months Rented: _____
 Heat Included in Rent: Yes No

PERSONAL DATA

	Taxpayer	Spouse
Name		
SSN		
Occupation		
Email		
Phone		
Birthdate		

Single Head of Household Married
 Divorced Separated Widow

Address _____

Changed Primary Residence

Yes No – Were you or your spouse a resident of another state or earned income in another state in 2023? **State** _____

Yes No – At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell/exchange/gift/otherwise dispose of a digital asset (or a financial interest in a digital asset i.e. Bitcoin/Cryptocurrency)?

IDENTIFICATION

Yes No – Did you renew your Driver's License in the last year or are you a new client? **Provide proof of identity to be eligible to e-file your tax return (driver's license or state issued photo ID) if you renewed your form of ID within the last 12 months or if you are a new client.**

BANKING INFORMATION

Yes No – Do you want to have any refund directly deposited or balance due directly withdrawn? **If yes, provide bank, routing number, account number, and if it is a checking or savings account.**

Deposited Withdrawn

Routing # _____ Account # _____

Bank Name _____ Checking Savings

DEPENDENTS

Name	SSN	Birthdate	2023 Months Lived in Home

Yes No – Can another person qualify to claim any of your dependents?

Provide documentation for proof of dependent related credits (tuition, school, medical, daycare records etc.)

Yes No – Did you pay childcare/dependent costs? **If yes, need the total amount paid per child and the daycare name, address, and identification number.**

INCOME – Check all that Apply

- Wages – **need W-2's**
- Lottery or Gambling Winnings – **need W-2G**
- Pension/Retirement – **need 1099-R**
- Dividends – **need 1099-DIV**
- Interest – **need 1099-INT**
- Unemployment – **need 1099-G, we can no longer lookup**
- Gov't or Ag Payments/Grants – **need 1099-G**
- Independent Contractor – **need 1099-MISC/NEC**
- Small Business Owner – **need 1099-MISC/NEC/K and additional income/expenses**
- Social Security – **need 1099-SSA**
- Sold Investment, Stocks or Bonds – **need 1099-B**
- Cancellation of Debt – **need 1099-C**
- Involved in Corp, Partnership, or Trust – **need K-1**
- Interest in Virtual Currency - **need 1099-B or 8949**
- Sold Primary Residence – **need sale date and sale amount**
- Owned Rental Property – **need income/expenses**
- Farm Income – **need income/expenses**
- Alimony (Paid or Received) – **need if divorce prior to 1/1/2019**
- Disability or SSI – **need 1099-SSA**

DEDUCTIONS – Check all that Apply

- Child Care Expenses – **need info listed above**
- Contributions to IRA's – **need contribution amount and date**
- College Tuition - **need 1098-T and student account record**
- Student Loan Interest – **need 1098-E**
- Contributions to 529 Education Plan – **need detail**
- Mortgage Interest – **need 1098**
- Un-reimbursed Medical Expenses \$ _____
- Un-reimbursed Dental Expenses \$ _____
- Cash Donations – **need documentation** \$ _____
- Non-Cash Donations – **need documentation** \$ _____
- Teacher Un-reimbursed Expenses \$ _____
- HSA Contributions – \$ _____
- Paid Real Estate Taxes – **need detail including date paid**

HEALTH CARE

- Yes No – Did you or any member of your family receive healthcare coverage through the Marketplace? **If yes, need Form 1095-A.**
- Yes No – Did you or any member of your family have a Medicare supplement/drug plan? **If yes, need the total premium paid per month for the plan.** \$ _____
- Yes No – Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year? **Need 1099-SA.**
- Yes No – Did you pay any long-term care premiums for yourself, your spouse or a dependent during the year? **If yes, Taxpayer \$ _____ Spouse \$ _____**
- Yes No – Did you pay any non-pre-tax health, dental, or vision insurance premiums? **If yes, Taxpayer \$ _____ Spouse \$ _____**

MISCELLANEOUS

- Yes No – Did you make any energy-efficient improvements for your home such as exterior doors, exterior skylights or windows, HVAC, insulation, solar, or biomass or have a home energy audit conducted during 2023? **If yes, need documentation.**
- Yes No – Did you purchase an electric vehicle in 2023? **If yes, need the purchase/sale documents.**
- Yes No – Did you make gifts to any one person in excess of \$17,000 during the year?
- Yes No – Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)? **If yes, need Notice CP01A from the IRS.**
- Yes No – Did you make any purchases subject to Sales and Use Tax that you did not pay Sales Tax on? **If yes, need the total amount purchased?** _____

ESTIMATED INCOME TAX PAYMENTS

Did you apply an overpayment of your 2022 taxes to your 2023 estimated taxes? **If yes, how much to State \$ _____ Federal \$ _____**
 Fill in any estimated tax payments made:

Quarter	State Amt Pd	Fed. Amt Pd	Date Paid
1 st	\$ _____	\$ _____	
2 nd	\$ _____	\$ _____	
3 rd	\$ _____	\$ _____	
4 th	\$ _____	\$ _____	

BUSINESS

- Yes No – Did you rent out your home or use part of it exclusively for business?
- Yes No – Did you begin or end a business in 2023?
- Yes No – Did you incur any business mileage during 2023? **If yes, need the vehicle year and model, and the number of business miles below.**

Vehicle	Business Miles	Personal Miles

- Yes No – Do you keep a record of your business miles? **If yes, how do you document.**

Please check our website for occupation and income specific Worksheets. www.Haukeness.tax

Please list any QUESTIONS about your tax preparation or COMMENTS about your included information that you would like us to know!

The information listed on this page is complete and accurate to the best of my knowledge.

 Taxpayer Signature and Date

 Spouse Signature and Date