

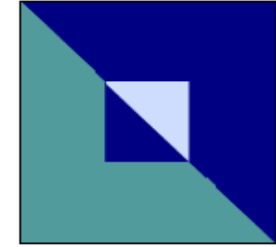
L.R. Bult & Associates, Ltd.

Certified Public Accountants

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Client Questionnaire - 2022 Tax Return



The Internal Revenue Service (IRS) matches information returns/forms with amounts reported on tax returns. Accordingly, all information returns reflecting amounts reported to the IRS are also mailed or delivered to the taxpayers in an envelope clearly marked "IMPORTANT TAX DOCUMENTS ENCLOSED" and should be submitted with this organizer.

Forms such as:

W-2 (Wages)
W-2G (Gambling Winnings)
1098 - Mortgage Interest
1098-T (Education)
Other Tax information statements

1099-R (Retirement)
1099-INT(Interest)
1099-DIV (Dividends)
1099-B (Brokerage Sales)

1099-MISC (Rents, etc.)
1099-G (Unemployment)
1099 (any other)
1095 (Health Insurance)

Charitable Contribution Statements
Annual Brokerage statements (and revised)
HUD-1 (Real Estate Sales/Purchases)
Schedule K-1

FILL OUT SHADED AREAS ONLY IF YOU ARE A NEW CLIENT OR ANY INFORMATION HAS CHANGED FROM PREVIOUS YEAR:					
Name		Social Security	Date of Birth	Occupation	Disabled
Taxpayer					
Spouse					
Street Address			City	State	Zip
**Taxpayer Drivers License or State ID #		State:	Date Issued:	Expires:	E-mail Address:
					Phone Number
					Alt Phone Number
**Spouse Drivers License or State ID #		State:	Date Issued:	Expires:	Email Address:
					Phone Number
					Alt Phone Number
Dependents Name (First, Last)		Relationship	Social Security #	Date of Birth	Disabled

**Refunds may be delayed without ID information.

Please answer the following questions to determine your maximum deductions:

DEPENDENT INFORMATION	Please Circle
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Did your marital status change during the year (by December 31, 2022)?	Yes	No	Not Sure
Were there any births, deaths, marriages, divorces, or adoptions in your immediate family?	Yes	No	Not Sure
Did you or your spouse retire or change jobs in 2022?	Yes	No	Not Sure
Were there any changes in dependents from the prior year?	Yes	No	Not Sure
<i>If yes, explain: _____</i>			
Did you have any children under the age of 19, or a full-time student under age 24 with unearned income of more than \$2,300?	Yes	No	Not Sure
Do you have dependents who must file a tax return?	Yes	No	Not Sure
Did you have any dependent care costs?	Yes	No	Not Sure

HEALTH INSURANCE	Please Circle
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Did you and all members of your household maintain minimum health care coverage for all months of 2022?	Yes	No	Not Sure
Did you or any member of your family enroll in health insurance coverage through the Health Insurance Marketplace at healthcare.gov under the Affordable Care Act?	Yes	No	Not Sure
<i>If yes, please enclose your form 1095A Health Insurance Marketplace Statement.</i>			
Do you currently have a Health Savings Account?	Yes	No	Not Sure
<i>If yes, please provide any 2022 contributions, distributions and the year end amount _____</i>			

INCOME INFORMATION	Please Circle
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Did you receive unemployment?	Yes	No	Not Sure
Did you have gambling winnings or losses this past year?	Yes	No	Not Sure
Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly?	Yes	No	Not Sure
Did you receive any disability income during the year?	Yes	No	Not Sure
Did you earn, receive, sell, send, exchange, gift or otherwise dispose of Virtual Currency or other digital assets such as NFTs?	Yes	No	Not Sure
Did you receive any other income or engage in bartering?	Yes	No	Not Sure

PURCHASES, SALES, DEBT INFORMATION	Please Circle
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Did you sell, exchange, or purchase any real estate during the year?	Yes No Not Sure
Did you acquire or dispose of any stock during the year?	Yes No Not Sure
Did you sell an existing business, rental, or other property this year?	Yes No Not Sure
Did you have any debts canceled or forgiven this year, such as a home mortgage, credit cards, or student loan(s)?	Yes No Not Sure
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?	Yes No Not Sure
Did you go through bankruptcy proceedings?	Yes No Not Sure

ITEMIZED DEDUCTION INFORMATION	Please Circle
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Did you make any cash charitable contributions?	Yes No Not Sure
<i>If yes, please provide the amount</i>	
Did you make any noncash charitable contributions (clothes, furniture, etc.)?	Yes No Not Sure
Did you make any major purchases during the year (cars, boats, etc.)?	Yes No Not Sure
Did you pay property tax this year?	Yes No Not Sure
Did you pay mortgage interest?	Yes No Not Sure
Did you incur expenses as a K-12 educator?	Yes No Not Sure
Did you incur a loss of property from a natural disaster or theft?	Yes No Not Sure

MISCELLANEOUS INFORMATION	Please Circle
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Did you give a gift of more than \$16,000 to one or more people?	Yes No Not Sure
Did you install any energy efficient improvements to your main residence (new construction and rentals do not apply) such as biomass stoves; generators; or fuel cells; or energy efficient improvements such as exterior windows, doors, and skylights; roofs; insulation; air source heat pumps; gas; propane or oil furnaces and fans; central air conditioners; or tankless water heaters?	Yes No Not Sure
Do you have a foreign bank account, trust, or business?	Yes No Not Sure
Did you have a financial interest in foreign financial assets?	Yes No Not Sure
Do you owe back child support or any other debts that could affect your return?	Yes No Not Sure
Do you have any unpaid sales/use tax for tax year 2022 (such as from goods you purchased online or from a catalog)?	Yes No Not Sure
Did you make any Federal and/or State estimated tax payments for the 2022 tax year?	Yes No Not Sure
<i>If yes, please provide the payment dates & amounts for all payments during 2022 & 2023 to date</i>	
Have you set up an online account at IRS.gov?	Yes No Not Sure
Have you ever received and ID Protection PIN from the IRS?	Yes No Not Sure
<i>If yes, please provide the current PIN Letter</i>	

EDUCATION INFORMATION	Please Circle
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Did you have any educational expenses during the year on behalf of yourself, spouse, or a dependent(s)? Yes No Not Sure
Did you pay interest on a student loan for yourself, your spouse, or your dependent(s) during the year? Yes No Not Sure
Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year? Yes No Not Sure
Did you cash any U.S Savings Bonds Series EE and/or I ? Yes No Not Sure
Would you like a FAFSA Worksheet completed with your return? Yes No Not Sure

DIRECT DEPOSIT OR REFUND	Please Circle
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Would you like to have your refund(s) directly deposited into your account? Yes No Not Sure

FILL OUT ONLY IF YOU ARE A NEW CLIENT OR ANY INFORMATION HAS CHANGED FROM PREVIOUS YEAR:

ACCOUNT:

Name of Financial Institution- _____

Name on Account- _____

Financial Institution Routing Transit Number- _____

Your Account Number- _____

Type of Account- Checking Traditional Savings Other *Please Specify* _____

We will prepare your 2022 Federal and State income tax returns using information you provide to us. We may ask for clarification of some items, but will not audit or otherwise verify the data to discover errors or omissions, should any exist. We will perform accounting services only as needed to prepare your tax returns and will not verify or audit your records. In instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select. The following Questionnaire will help organize important information in order to facilitate an efficient preparation of your return.

To the best of my knowledge the information enclosed in this client tax organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's tax returns for which I have adequate records.

Taxpayer

Date

Spouse

Date