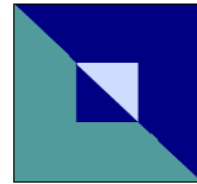


# L.R. Bult & Associates, Ltd.

Certified Public Accountants  
1467 Ring Road, Calumet City, IL 60409

Tel: (708) 862-9400 Fax: (708) 862-1099 www.lrbult.com



## Client Questionnaire - 2023 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)	1099-R (Retirement)	1099-MISC (Rents, etc.)	Charitable Contribution Statements
W-2G (Gambling Winnings)	1099-INT (Interest)	1099-G (Unemployment)	Annual Brokerage statements (and revised)
1098 - Mortgage Interest	1099-DIV (Dividends)	1099 (any other)	HUD-1 (Real Estate Sales/Purchases)
1098-T (Education)	1099-B (Brokerage Sales)	1095 (Health Insurance)	Schedule K-1
Other Tax information statements			

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

- Did your marital status change during the year (by December 31, 2023)? 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 2023? Yes No Not Sure
- Were there any changes in dependents from the prior year? Yes No Not Sure
- If yes, explain:* \_\_\_\_\_
- Did you have any children under the age of 19, or a full-time student under age 24 with unearned income of more than \$1,300? 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

- 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
- If yes, please enclose your form 1095A Health Insurance Marketplace Statement.*
- Do you currently have a Health Savings Account? Yes No Not Sure
- If yes, please provide any 2022 contributions, distributions and the year end amount \_\_\_\_\_*

### INCOME INFORMATION Please Circle

- 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

**(CONTINUE ON BACK)**

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? *If yes, please provide the amount:* ..... Yes No Not Sure

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, or do you plan to, contribute to an IRA (Traditional or Roth) for 2023? ..... Yes No Not Sure  
*If yes, please provide type of IRA and amounts for you, spouse, and/or dependents* .....

Did you pay any individual \$2,600 or more to perform household services such as babysitting, landscaping, or caregiving? ..... Yes No Not Sure

Did you give a gift of more than \$17,000 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 solar electric or water heating, fuel cell, wind energy, geothermal heat, biomass stoves; or energy efficient improvements such as exterior windows, doors, and skylights, furnaces, A/C, or water heater? ..... Yes No Not Sure

Did you have a financial interest in foreign financial assets such as a bank account, trust, or business? ..... 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 2023 (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 2023 tax year? ..... Yes No Not Sure  
*If yes, please provide the payment dates & amounts for all payments during 2023 & 2024 to date* .....

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  
*If yes, please provide the current PIN Letter* .....

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 (529 Plan) 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:
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**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 2023 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