



## 2023 Tax Questionnaire

Dear Valued Client,

### PLEASE NOTE:

Clients are welcome to mail documents, drop them off, fax, or email them together in one or two attachments at any point during tax season. Please note that any documents sent or dropped off at our office after **March 18, 2024** may require an extension. Therefore, we encourage clients to send us their documentation as early as possible. Thank you!

This questionnaire helps us gather important information so we can be as thorough as possible in preparing your tax returns. Our country's tax laws are rapidly changing and affecting more and more people. The sheer complexity requires more attention to details than ever before. Whether you mail or drop off your tax information, please take a few moments to complete the questionnaire and do not hesitate to call my office if you have any questions. **The Internal Revenue Service has mandated tax preparers to file all tax returns electronically. If you have any questions or concerns regarding this mandate, please call.**

**Please note that the Internal Revenue Service NEVER contacts any taxpayer through the internet or e-mail. Please disregard any e-mails sent from the Internal Revenue Service as spam. In addition, the Internal Revenue Service will never contact a taxpayer by phone prior to attempting to contact them via U.S. mail. Please use caution with anyone calling and attempting to collect personal information or money and stating that they are with the Internal Revenue Service.**

Client Name: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

### Personal Information:

Are you a new tax client? (circle YES or NO)	Yes	No
Did your marital status change during 2023? (If divorced, please provide divorce decree)	Yes	No
Did your address change since filing your 2022 tax return(s)?	Yes	No
Did your telephone number change since filing your 2022 tax return(s)?	Yes	No
Are you or your spouse considered legally blind?	Yes	No
Please provide your current occupation (occupations for both you and your spouse if filing jointly):		

**If you have an Identity Protection (IP) PIN to increase filing security, please provide it to Alex. If you would like an (IP) PIN, visit IRS.gov to apply.**

### Dependents:

Were there any changes in dependents from the prior year? **Please provide the name, social security number and date of birth for any newborn children or any new dependent parents.**

	Yes	No
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Did you pay for child care while you worked, or searched for work?

	Yes	No
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Do you have any children under age 18 with **unearned** income, such as dividends, interest and capital gains of more than \$1,250? Yes                      No

Did you pay any tuition, book fees or lab fees over \$250 for any dependent(s) for the school years Kindergarten through Grade 12 to any public or private schools located in Illinois? If yes, please provide the dependent's name, grade, name and city of the school, and total amount paid for tuition and fees. Yes                      No

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**Purchases, Sales and Debt:**

Did you Purchase, Sell, or Refinance any real estate in 2023, including your personal residence? If so, please provide **Closing Disclosures**. Yes                      No

Did you have any debts canceled or forgiven, such as credit cards or loans, during 2023? If so, please provide 1099-A and/or 1099-C. Yes                      No

Do you currently have or did you take out a home equity loan in 2023? Yes                      No

If so, were any of the funds used to purchase or improve your primary or second home? If yes, please provide details. Yes                      No

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**Itemized Deductions:**

Did you have substantial medical expenses (including health insurance premiums, prescription drugs, dental and vision) paid out of your own pocket in 2023 which exceeded 7.5% of your income? Yes                      No

If you were covered by Medicare, do you have any supplemental insurance policies? Yes                      No

Did you pay for any long term care insurance also known as nursing home care insurance? If so, how much did you pay in 2023? Yes                      No

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Did you make any charitable contributions, cash or non-cash (such as clothing or household items) during 2023? If so, please provide a list of the amounts and to whom the contributions were made. You must have a bank record of the contribution or a letter from the charity for cash contributions, and all donated goods must be in good condition or better. **If applicable, please provide below the number of charitable miles that were driven in 2023.** Yes                      No

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**If you plan to make or have made any charitable contributions of appreciated capital gain property (such as stocks, artwork, or land held more than one year), please indicate if you would like to discuss this option, or please provide documentation.** Yes                      No

Did you make any large purchases such as a motor vehicle, boat or substantially remodel your home in 2023? Yes                      No

If yes, please provide the purchase amount and documents showing the amount of sales tax paid (for example, Form ST-556 for new vehicle purchases).

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## Miscellaneous

Did you pay any personal property taxes, including vehicle taxes, in 2023? (Not applicable to Illinois residents)

Yes No

If so, please provide details and the amounts.

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Did you have any additional income that has not been reported, such as tip income or any other miscellaneous income?

Yes No

If you were a teacher, instructor, counselor, principal or aide for grades K-12 for at least 900 hours in 2023, did you have out of pocket expenses for books or supplies, used in the classroom? If so, please indicate the amount up to \$300.

Yes No

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Did you purchase healthcare coverage (health insurance) through the Marketplace for you, your spouse, and any dependents? If yes, provide Forms 1095-A. For other healthcare coverage please provide forms 1095-B, and 1095-C.

Yes No

Did you receive any unemployment compensation in 2023? If so, please provide a copy of Form 1099-G.

Yes No

If you are taking a mileage deduction did you keep the REQUIRED mileage log to support your deduction?

Yes No

If you were **self-employed** or had rental property in 2023 did you provide 1099's to your non-corporate outside contractors, as required?

Yes No

If you were **self-employed**, did you have any of the following? If yes, please provide details.

Health insurance expenses for you and your family.

Yes No

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Auto loan interest paid on your business vehicle.

Yes No

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Did you use an office in your home to conduct any business activity?

Yes No

Did you or your dependents incur any expenses for tuition, books, fees, day/summer camp, etc. for college courses or vocational school programs in 2023?

Yes No

If yes, please list the amounts paid in 2023 and the year in school for you and/or your dependent(s), and provide all form 1098-T's.

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Did you or your dependents pay any student loan interest in 2023? If so, please provide the amount paid, and all form 1098-E's.

Yes No

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Did you install any energy efficient improvements to your principal residence in 2023, such as exterior doors or windows, furnaces, insulation, central air conditioners, water heaters, heat pumps, or improvements involving solar, wind, geothermal, and fuel cell technologies? **If yes, please provide receipt of purchase along with a copy of the manufacturer's tax credit certification statement.**

Yes No

Did you purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle in 2023?

Yes No

Were you covered by an employer HSA plan in 2023 or was an HSA plan available through your employer? If you had a distribution from an HSA please include Form 1099-SA, which may only be available on-line.

Yes No

Do you or your spouse own any foreign assets?	Yes	No
Do you have stocks or any other securities in regular (non IRA and non 401-K) accounts that have decreased in value or have become worthless?	Yes	No
Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you, or dispose of any stock acquired under a qualified employee stock purchase plan?	Yes	No
In 2023, did you or your spouse: (a) receive (as a reward, award, or compensation); (b) sell, exchange, gift or otherwise dispose of a digital asset (or financial interest in a digital asset)? This would include nonfungible tokens (NFTs), bitcoin, etc.	Yes	No
Did you make gifts of more than \$17,000 in cash or property to any individual?	Yes	No
Did you make any traditional IRA contributions during 2023 or do you plan on making any traditional IRA contributions before April 15th, 2024 for 2023? If so, please provide the amount and the date contributed (\$6500 maximum contribution; \$7500 maximum contribution if over 50 years old as of 12/31/23).	Yes	No

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Did you make any Roth IRA contributions during 2023 or do you plan on making any Roth IRA contributions before April 15th, 2024 for 2023? If so, please provide the amount and the date contributed? (\$6500 maximum contribution; \$7500 maximum contribution if over 50 years old as of 12/31/23). Yes No

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Did you convert an existing IRA into a Roth IRA?	Yes	No
Would you like to discuss a Roth IRA conversion?	Yes	No
Would you like to discuss any estate issues, such as executors, wills or trusts?	Yes	No
Did you incur any uninsured casualty or theft loss in a federal disaster area during 2023?	Yes	No

At any time during 2023, were you or your spouse a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country? Yes No

Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529 plan)? If yes, include all Forms 1099-Q and 1098-T along with related expenses. This includes eligible distribution for tuition paid to a private school for grades K-12 Yes No

Did you make any contributions to Qualified Illinois State Tuition Section 529 Plans (Bright Start, Bright Directions or College Illinois), or another state's qualified tuition section 529 Plan for non-residents of Illinois for your children or grandchildren during 2023? If so, how much was contributed and for which child? Please include the account numbers for each child. Yes No

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If you paid real estate taxes in 2023 on your **principal residence**, please provide the Property Tax PIN # below: **(Only required for new clients or if you moved in 2023)**

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If you (or your spouse) are 73 or older on 12/31/2023 and have Qualified Retirement Plans and/or IRA's, are you taking the required minimum distribution?

	Yes	No
Did you purchase any items on the internet, mail order or other out of state purchases and not pay Illinois State Sales Tax (or your state of residency sales tax if other than an Illinois resident) on the purchase? Illinois requires you to pay sales tax on these purchases. If yes, please provide details. If you do not have the exact records, please estimate the gross purchases.	Yes	No

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Did you pay in excess of \$1,000 in any quarter, or \$2,600 during the year for domestic services performed by individuals who could be considered household employees, such as nannies, cleaning individuals, etc.?

Yes No

**If Applicable:**

Once your returns are completed, would you like our office to supply you with a hard copy of your tax returns, or would you like a PDF copy?

If you prefer a hard copy of your return, would you like our office to mail your completed returns to you? If not, we will keep your returns here for pick up.

Yes No

Once your returns are completed, would you like to e-mail or fax me the required forms "8879" and "IL-8453" to e-file your returns? If not, I will provide you with a return envelope.

Yes No

If required, were all of your quarterly Federal and State estimated tax payments made? Yes No

Please provide all estimate amounts paid and the dates payments were made.

Would you like your Federal and State refunds directly deposited into your bank account? Yes No

If yes, and you used direct deposit last year, do you want the refund deposited in the same account?

Yes No

If yes, and you have never used direct deposit, or if your bank account has changed since last year, please provide the following information or a voided check.

Name of Bank: \_\_\_\_\_

Bank Routing Number (9 digits): \_\_\_\_\_

Account Number: \_\_\_\_\_

Account type:                      checking                      savings

Please provide the following information regarding your drivers license or state ID:

**Taxpayer:**

**Spouse:**

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Type: \_\_\_\_\_

Type: \_\_\_\_\_

Number: \_\_\_\_\_

Number: \_\_\_\_\_

Issuing State: \_\_\_\_\_

Issuing State: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Issue Date: \_\_\_\_\_

Issue Date: \_\_\_\_\_

Please provide any further information below for questions that you answered Yes to above, and write down any questions or comments you may have regarding your 2023 income tax returns.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Tax Planning Information for Tax Year 2024:**

Please provide details below if you expect any of the following or any other relevant changes to occur in 2024: A change in your marital status, a change in the number of your dependents, a substantial change in your

income, a substantial change in deductions, or a substantial change in your withholding.

If you are 70 1/2 or older and take distributions from your IRA account and make charitable contributions, it may be beneficial to make these contributions directly from your IRA to the charitable organization. Please indicate if you would like to discuss this option. Yes                      No

If you are a homeowner, you may qualify for property tax exemptions in addition to homeowner's exemption. Exemptions are available for seniors, senior freeze, persons with disabilities, returning veterans, veterans with disabilities, home improvements, and longtime homeowners. We encourage you to contact your local assessor's office to inquire if you are eligible to apply.

**Please email your completed questionnaire to:  
allison@alexgountaniscpa.com or fax to (847) 253-5997.  
You may also drop it off in person or mail with  
the rest of your tax documentation.**

I thank you for your business and the confidence you have shown by your referrals, which are welcomed and most sincerely appreciated. Since your referrals are generally individuals you are acquainted with, you can be assured that no personal financial data whatsoever will ever be shared. As always, I look forward to serving your tax and financial needs.

Thank You,  
Alex Gountanis, CPA