

Continental Tax Planners
2023 Tax Year Questionnaire for New Clients

Taxpayer	Spouse
Name:	Name:
SSN:	SSN:
DOB	DOB
Occupation:	Occupation:
Email:	Email:
Cell:	Cell:
Phone:	Phone:
Do you have a driver's license? <input type="checkbox"/> Yes <input type="checkbox"/> No (Please provide a copy of front and back)	Do you have a driver's license? <input type="checkbox"/> Yes <input type="checkbox"/> No (Please provide a copy of front and back)

What is your filing status? Single Married Joint Head of Household
 Married Separate Surviving Spouse (must have dependent child)

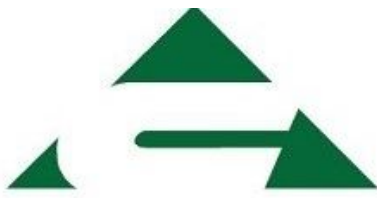
Mailing Address:

City: State: Zip Code:

Dependent's Name	SSN	Date of Birth	Relationship

Please complete all fields that pertain to your 2022 tax year

Do any dependents have earned income > \$12,350 or investment income > \$1,100?
 Yes No If yes, a return may be required.



For Daycare and Summer/Sports Camps (under age 13)

* Add list below if you need more space, must list amount paid per child

Child	Provider's Name	Provider's Address	Tax ID	Amount Paid

Do you have a College and/or Grad Student as a dependent? Yes No

If yes you MUST supply a form 1098-T from the school and receipts of other expenses.

Do you have:

Health Savings Account (HSA) Taxpayer Yes No Spouse Yes No

Individual Retirement Account (IRA) Taxpayer Yes No Spouse Yes No

Roth IRA Taxpayer Yes No Spouse Yes No

Additional Questions:

Are you paying student loans? Yes No Spouse Yes No

Do you have more than average medical expenses? Yes No

Did you make any large purchases with sales tax? Yes No

Did you make any energy efficient purchases? Yes No

Do have any K1's from S-Corp, Partnership, Trust or Estate? Yes No

Did you receive a credit to subsidize your health insurance? Yes No

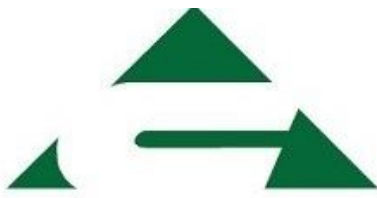
If yes, please supply your 1095-A

Did you contribute at a NYS529 Plan? Yes No Spouse Yes No

Itemized Deduction:

Medical Expenses

Doctors/Dentist	Prescriptions	Hospital, Labs	Glasses/contacts



Taxes and Interest Paid: **Provide copies of all 1098 forms received. If you do not have a form 1098 please complete below.**

Mortgage Holder	Mortgage Interest	Real Estate Taxes	PMI

Charitable Contributions: Attach list if add'l space is needed. *Please include whether you itemize or not.*

Name of Charity	Amount	Name of Charity	Amount

Did you donate any clothes, household item? Yes No

If yes and exceeded \$500 then you will need to supply details and values

Did you do any volunteer or charitable work that required driving? Yes No

If yes please provide miles driven

Please provide your banking information for either direct deposit or electronic payment of tax:

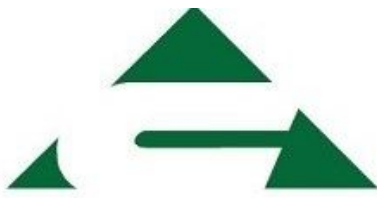
Bank Name	Routing Number	Account Number

Required Questions from the IRS (You must answer yes or no for each question).

Does the tax payer or spouse have any interest or signature over a foreign financial account?

If yes, was the total value \$10,000 or more during the year at any time?

The Virtual Currency question—at **any time** during 2023, **did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?**



Required Questions (You must answer yes or no for each question).

New Clients Only: Did you file a tax Return in 2022?

If yes, you must provide us with a copy.

Are you self-employed? Taxpayer Spouse

Do you have a rental property?

Checklist of required items to file you 2023 return:

- Social Security Cards for filers and dependents 2 forms of ID for filers
- ID for dependents Prior year tax return

INCOME SOURCES - Please include copies of the following source documents:

W2 Wages; W2G Gambling Income; SSA-1099 (Social Security Statement); 1099R (pension)
1099-Misc; 1099-NEC; 1099-Int (Interest) 1099-DIV (Dividends)
1099-G (Government payments including unemployment)
1099-B Stocks, Bonds, Real Estate - **must provide purchase price & date, sale price & date
(unless you have a broker statement that includes the details)**
Other Income: alimony, Jury Duty, tips, prizes, unreported tips

Self Employed and Rental Properties:

If you have a rental please full address of the rental and provide all rents collected and expenses by rental property. (If you need a worksheet we can provide)

If you are self employed please provide type of business and ALL income and expense that relate to the business. If you have more than one they must be separate. (If you need a worksheet we can provide)

Please do not send receipts but make sure you save them.