

Lionel's Tax & Bookkeeping Service

<http://www.lionelstaxbkkpg.com>

CLIENT TAX QUESTIONNAIRE 2023

Your Name: _____ Spouse Name: _____

Please provide records/documentation at the time of your appointment for income, expenses or deductions for any items to which you answer "Yes".

- | | Yes | No |
|---|--------------------------|--------------------------|
| 1. Did your marital status change during 2023?
If yes, please explain _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Did you retire in 2023? Do you or your spouse plan to retire in 2024? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Enter date of death for taxpayer or spouse (if during 2022 or 2023) | | |
| Taxpayer: _____ Spouse: _____ | | |
| 4. Were you or your spouse permanently and totally disabled in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Did you receive any disability payments in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Do you have dependents who must file? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Do you have children under age 18 or a full-time student age 19-23 with investment income greater than \$2,500? | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Did you provide over half the support for any other person during 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Are any of your dependents not U.S. citizens or residents? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Did you incur adoption expenses during 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Did you receive payments from a pension or profit-sharing plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Did you receive tip income not reported to your employer? | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Did you buy or sell a principal residence or other real property in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. Did you refinance a principal residence or other real property and pay points in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Are you planning to purchase a home soon? | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Did you incur any casualty or theft losses during 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. Did you incur any non-business bad debts? | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. Did you or your spouse make gifts or over \$15,000 to an individual or contribute to a prepaid tuition plans? | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. Did you pay any individual for domestic services in 2023 (housekeeping, etc.)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 21. Did you buy or sell any stocks or bonds in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 22. Did you, your spouse, or your dependents attend post-secondary school in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 23. Did you use the proceed from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education? | <input type="checkbox"/> | <input type="checkbox"/> |
| 24. Did you pay interest on a student loan for yourself, your spouse or your dependent? | <input type="checkbox"/> | <input type="checkbox"/> |
| 25. Did you incur any job-related moving expenses in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 26. Do you expect your income and deduction in 2023 to be the same as 2022? | <input type="checkbox"/> | <input type="checkbox"/> |
| 27. Did you pay alimony or collect alimony in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |

Grigsby Mosley Tax & Accounting Services

Mittie Grigsby & Lionel Mosley, **Oakland TEL:** (510) 638-4878 / **San Jose TEL:** (408) 274-8727
EMAIL: lionelstaxbkkpg@att.net **WEB:** www.gmtaxbayarea.com

- | | Yes | No |
|--|--------------------------|--------------------------|
| 28. Do you want direct deposit of any federal or state refund? | <input type="checkbox"/> | <input type="checkbox"/> |
| 29. Did you start a business, purchase a rental property or farm, or acquire interest in partnerships, S corporations or trusts? | <input type="checkbox"/> | <input type="checkbox"/> |
| 30. Did you sell crypto currency or suffer crypto-related losses in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 31. Did you purchase a hybrid vehicle in 2023? If yes, enter year, make, model, battery size and date purchased: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 32. Did you donate a vehicle in 2023? If yes, attach Form 1098C | <input type="checkbox"/> | <input type="checkbox"/> |
| 33. What was the sales tax rate in your locality in 2023? _____% | | |
| 34. Did your lender cancel any of your debt in 2023? (Attach any forms 1099A or 1099C) | <input type="checkbox"/> | <input type="checkbox"/> |
| 35. Do you have records to support your expenses? | <input type="checkbox"/> | <input type="checkbox"/> |
| 36. Did you incur health care expenses outside of your employer's health plan coverage? | <input type="checkbox"/> | <input type="checkbox"/> |
| 37. Did you receive Unemployment compensation in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 38. Did you receive a settlement for compensatory or punitive damages in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |
| 39. Did you inherit a home that was sold in 2023? (if so, please provide appraised value.) | <input type="checkbox"/> | <input type="checkbox"/> |
| 40. Did you have any lottery winnings or other gambling winnings in 2023? | <input type="checkbox"/> | <input type="checkbox"/> |

Appendix

To reduce the opportunity of identity fraud, please provide me with your Driver's license number or ID number (all filers), date license was issued and expiration date of the license (this is optional but is recommended). If you provided this information to me for 2022 there is no need to provide it this year, unless you renewed your license since initially providing this information.

Name	ID or License Number	Date Issued	Date of Expiration

Please list all dependents for the tax year ended 2023:

Dependent Name	Age	Relationship	Social Security Number

Grigsby Mosley Tax & Accounting Services

Mittie Grigsby & Lionel Mosley, Oakland TEL: (510) 638-4878 / San Jose TEL: (408) 274-8727

EMAIL: lionelstaxbkkpg@att.net WEB: www.gmtaxbayarea.com

Did you use a portion of your home **exclusively** for business? If so, please provide the following information:

Square footage of your home office area: _____

Total square footage of your home: _____

Total rent paid, if home is rented: \$ _____

Total Invoices for repairs and maintenance on your house: \$ _____

Total Utility bills: \$ _____

Child Care Costs

If you used the services of a childcare provider, please provide me with the following, even if the information is the same as the prior year:

Childcare provider's name: _____

Provider's address: _____

Provider's tax ID or Social Security number: _____

Additional Notes:
