



Required Individual Questionnaire

At any time during 2022, did you (a) receive (as a reward, award, or compensation); or (b) sell, exchange, gift, or otherwise dispose of any digital asset (or a financial interest in a digital asset? Example: Bitcoin, Ethereum, Dogecoin, etc.

At any time in 2022, did you have financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign county? See instructions...

If yes, on the last day of the year was the highest balance over \$50,000(S/MFS)/\$100,000 (MFJ)?

If yes, at any time during the year was the highest balance over \$75,000(S/MFS)/\$150,000 (MFJ)?

NOTE: If “Yes,” are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements...

If yes, did you or are you going to complete the FINCEN filing?

If you are required to file FinCEN Form 114, enter the name of the foreign country where the financial account is located _____

Did you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?

Do you want your refund (if applicable) to be deposited into your bank account?

Bank Name _____ Type: _____

Routing Number _____ Account Number _____

If you owe the IRS, do you want the IRS to draft your bank account listed above?

If you owe the State, do you want the State to draft your bank account listed above?

Did you make any estimated tax payments?

To the IRS:

To the State

Q1 Amount _____	Date Paid _____	Q1 Amount _____	Date Paid _____
Q2 Amount _____	Date Paid _____	Q2 Amount _____	Date Paid _____
Q3 Amount _____	Date Paid _____	Q3 Amount _____	Date Paid _____
Q4 Amount _____	Date Paid _____	Q4 Amount _____	Date Paid _____

Do we have copies of current driver licenses?

If not, please provide. If you have renewed your license or your license expired last year, I need a new copy.

Did you make and/or your spouse make back door Roth IRA contributions/conversions?

Did you contribute to a Health Savings Account (HSA)?

If yes, please provide Form 1099-SA and Form 5498-SA

Did you receive health insurance through the Market Place?

If yes, provide Form 1095-A

Have you had any issued with identity theft, did the IRS provide you with an Identity Protection PIN?

If yes, please provide the IRS letter.

Have you had any changes in dependents this year?

If yes, please explain _____

Do you have receipts for all your charitable contributions?

Do your home mortgages exceed \$750,000?

Do you have a home equity loan?

If yes, was it used to buy, build, or improve your personal residence?

Did you refinance your home during the year?

If yes, please provide closing documents.

Did you contribute to any 529 plan accounts?

If yes, what state is the plan? _____

If yes, please provide annual statement which show the amount contributed in 2022.

Do you have a mentally or physically disabled child?

If yes, please provide Form AR1000RC5 which has been signed by a doctor or examiner.

If you have a small business and report a Sch C, Sch E, or Sch F on your tax return:

Did you make any payment that will require filing Form(s) 1099?

If yes, all required Forms 1099 were or will be filed?

Additional Notes or Comments

Signature

Date