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1. On your device, open the Google Drive app.
2. Tap the PDF that you want to fill out.
3. At the bottom right, tap Edit  > Form Filling .

 - If you don't see the option, you may not be able to fill out this PDF.

4. Enter your information in the PDF form.
5. At the top right, tap **Save**.
 - To save as a copy, click More  > **Save as**.

Fill out a PDF form.

To fill out a PDF form, open the PDF in Google Chrome or another PDF editor, like Adobe Acrobat or Preview on macOS.

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Please upload at encyro.com/thattaxplace

that TAX PLACE
2023 CLIENT TAX QUESTIONNAIRE

(Please Print)

TAXPAYER INFORMATION												
Taxpayer Last Name:		First:	Middle:	Suffix:	<input type="checkbox"/> Mr.	<input type="checkbox"/> Miss	Marital Status:					
					<input type="checkbox"/> Mrs.	<input type="checkbox"/> Ms.	Single	<input type="checkbox"/> Married	<input type="checkbox"/> Div	<input type="checkbox"/> Sep	<input type="checkbox"/> Widow	
Social Security Number:		Date of Birth:	Age:	Occupation:		Home Phone:		Cell Phone:				
Email Address:						Preferred Method of Contact:						
						Home Phone		<input type="checkbox"/>	Cell Phone		<input type="checkbox"/>	
						Email		<input type="checkbox"/>	Text			<input type="checkbox"/>
Street Address:							Apt. #:					
City:			State:			Zip Code:						
Did your marital status change during the year?				<input type="checkbox"/> Y	<input type="checkbox"/> N	Did your address change during the year?				<input type="checkbox"/> Y	<input type="checkbox"/> N	

SPOUSE INFORMATION										
Spouse Last Name:		First:	Middle:	Suffix:	<input type="checkbox"/> Mr.	<input type="checkbox"/> Miss				
					<input type="checkbox"/> Mrs.	<input type="checkbox"/> Ms.				
Social Security Number:		Date of Birth:	Age:	Occupation:		Cell Phone:				

DEPENDENTS (CHILDREN AND OTHERS)								
Name (Last, First)	Relationship	Date of Birth mm/dd/yyyy	Social Security Number	Months Lived With You	Full-Time Student	Did You Provide More Than Half of the Support?		
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N

• Do you provide a home for or help support anyone else, not listed above?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Were there any births, deaths, marriages, divorces or adoptions in your immediate family in 2023 or 2024? (If yes, list details in "Other Information" Section on page 3)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Could you be claimed as a dependent on another person's tax return for 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• If requested by the IRS, do you have documentation (i.e. receipts, records) to substantiate your eligibility for the Child Tax Credit, Earned Income Tax Credit and/or Head of Household Filing Status?	<input type="checkbox"/> Y	<input type="checkbox"/> N

INCOME INFORMATION		
• Did you receive any income from employment as an employee or independent contractor? (If yes, attach Form W-2 and/or 1099-NEC)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive any Unemployment Compensation in 2023? (If yes, attach 1099-G)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive any Social Security benefits during 2023? (If yes, attach Form SSA-1099)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you sell any Stocks/Investments in 2023? (If yes, attach 1099-B)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive Interest Income from a savings account or dividends from mutual funds/investments? (If yes, attach Form 1099-INT and/or 1099-DIV)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you have any gambling winnings or losses, including lottery, bingo and raffles? (If yes, attach W2-G)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive, sell, exchange or dispose any virtual currency?	<input type="checkbox"/> Y	<input type="checkbox"/> N

RETIREMENT INFORMATION

• Did you or your spouse receive payments/distributions from a retirement plan such as a pension, 401K, IRA) in 2023 or plan to in 2024? (If yes, attach Form 1099-R)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive a distribution from a retirement plan in order to pay medical bills, for higher education expenses or to purchase a home in 2023? (If yes, list reason: _____)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you make any contributions to a retirement plan such as a pension, 401K, IRA, SEP, SIMPLE in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N

HEALTH INFORMATION

• Did you purchase health insurance from the Healthcare.gov Marketplace in 2023? (If yes, attach Form 1095-A)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you or your spouse participate in a Health Savings Account (HSA) or other Medical Savings Account in 2023? (If yes, attach Form 1099-SA and Form 5498-SA)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you/ spouse/dependent incur a substantial amount of unreimbursed medical expenses in 2021?	<input type="checkbox"/> Y	<input type="checkbox"/> N

HOUSING INFORMATION

• Do you own a home? (If yes, attach Form 1098 – Mortgage Interest and 2023 Property Tax Statement)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you sell and/or purchase a home in 2023 or 2024? (If yes, attach Closing Disclosure & 1099-S)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive rent from real estate or other property? (If yes, attach support for income and expenses)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Was your principal home or rental property foreclosed on in 2023 or 2024 (If yes, attach 1099A or 1099C)	<input type="checkbox"/> Y	<input type="checkbox"/> N

CHILD AND DEPENDENT CARE

• Did you receive dependent care benefits from your employer in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you pay any child/dependent care expenses in 2023 for a child under 13 years old or costs to care for a handicapped individual? If yes, complete the following:	<input type="checkbox"/> Y	<input type="checkbox"/> N
Name of Child Care Provider:	Provider EIN/Social Security Number:	
Provider Address	Amount Paid to Provider	
	\$	

EDUCATION

• Did you, your spouse or a dependent incur any tuition, fees or book expenses that were required to attend college, university or vocational school in 2023? (If yes, attach 1098-T and support for expenses)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you, your spouse or a dependent receive scholarships or grants for higher education in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you, your spouse or dependent receive a distribution from a 529 Plan or Education Savings Plan in 2023? (If yes, attach Form 1099-Q.)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you make any contributions to a 529 Plan or Education Savings Plan in 2023? (Attach support)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you pay any Student Loan Interest in 2023? (If yes, attach Form 1098-E)	<input type="checkbox"/> Y	<input type="checkbox"/> N

ITEMIZED DEDUCTIONS

Note: The IRS allows taxpayers to reduce their income by taking the higher of the Standard Deduction or Itemized Deductions. For 2023, the standard deduction is \$13,850 for Single Filers, \$20,800 for HOH and \$27,700 for Married Filers.

• Did you make charitable contributions in 2023? (If yes and you itemize, attach receipts or acknowledgments from charity, canceled check or other proof)	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you use your vehicle to provide volunteer services to a charity?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you pay state taxes on new vehicle purchased or monthly lease in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• List your vehicle property taxes \$ _____ {do not include registration fees}		
• Did you owe State or Local taxes when you filed your 2021 Income Tax Return? If yes, please list amount paid in 2023: \$ _____	<input type="checkbox"/> Y	<input type="checkbox"/> N

MISCELLANEOUS QUESTIONS

Did you pay estimated taxes in 2023? **If yes please list dates and amounts in comments below**

Did you have Crypto currency in 2023-**attach completed tax forms/statements** {additional requirements might be needed

Energy Credits **If you are claiming energy credits please know that there are several documents you must provide in order for us to calculate those credits for home or automobile. Please request the list if you did not receive it.

BUSINESS INFORMATION

Note: Complete this section if you received a 1099-NEC, 1099-MISC, 1099-K or own a small business.

- Date you started your business: / /
- Did you materially participate in this business in 2023? Y N
- Did you pay estimated taxes in 2023? If yes list date paid and amounts in comments below. Y N
- Do you have records to support your business expenses? Please attach records with classifications Y N
- Did you use your vehicle for your business? List make and model and year started in comments below Y N
- Do you have written evidence to support your vehicle expenses? Please list the following: Y N

Business Miles Driven in 2023

Commuting Miles Driven in 2023

Other Miles Driven in 2023

FILING QUESTIONS

- **Did you receive or request a six-digit Identity Protection PIN number from the IRS?** Y N
- The IRS is able to deposit refunds directly into up to (3) taxpayer's accounts. If you receive a refund, would you like a direct deposit? If yes list below. Y N
- If yes, please provide the following information:

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account	
			<input type="checkbox"/> Checking	<input type="checkbox"/> Savings
			<input type="checkbox"/> Checking	<input type="checkbox"/> Savings
			<input type="checkbox"/> Checking	<input type="checkbox"/> Savings

Select type of Tax Return Copy for your personal files: Electronic Copy Paper Copy with Folder

How did you hear about that TAX PLACE? Family/Friend (List Name):

Google/Website Search Other (List Source):

QUESTIONS, COMMENTS AND OTHER INFORMATION

_____ Taxpayer Signature Date: _____

_____ Spouse Signature Date: _____