# BERKSHIRE TAX SERVICES, LLC 2023 CLIENT TAX QUESTIONNAIRE

(Please Print)

TAXPAYER INFORMATION													
Taxpayer Last Name:	Taxpayer Last Name: First: Middle: Suffix: 🗆 Mr. 🗆 Miss Marital Status:												
					[	⊐ Mrs.	□ Ms.	Single□ Married□ Div □ Sep□ Widow			ow□		
Social Security Number:	Date of	f Birth:	Ag	e:	00	cupat	ion:	Но	me Phor	ne:	C	ell Phone:	
Email Address:	Email Address: Preferred Method of Contact:												
						Home	Phone 🗆	Cell Ph	none 🗆	Email		Text□	
Street Address:									Apt. #:				
City:		St	tate:					Zip	Code:				
Did your marital status change during the year?			□ Y	□ N	Did	your add	ress cho	ange duri	ing the y	/ear?	□ Y	□ N	

SPOUSE INFORMATION							
Spouse Last Name:	First: Middle:	Suffix	<b>c</b> □ Mr.	□ Miss			
			□ Mrs.	□ Ms.			
Social Security Number:	per: Date of Birth: Age:		Occupati	ion:	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		Pro More Half	You vide Than of the oort?	
					Π Υ	□ N	□ Y	□ N	
					Π Υ	□ N	Π Υ	□ N	
					Ο Υ	ΠN	□ Y	ΠN	
					Ο Υ		□ Y	ΠN	
					Π Υ		□ Y	□ N	

•	Do you provide a home for or help support anyone else, not listed above?	Δ Υ	□ 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)	□ Y	ΠN
•	Could you be claimed as a dependent on another person's tax return for 2023?	Ο Υ	□ 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?	Π Υ	□ 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)	□ Y	□ N
•	Did you receive any Unemployment Compensation in 2023? (If yes, attach 1099-G)	□ Y	□ N
•	Did you receive any Social Security benefits during 2023? (If yes, attach Form SSA-1099)	Δ Υ	□ N
•	Did you sell any Stocks/Investments in 2023? (If yes, attach 1099-B)	Π Υ	□ 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)	Π Υ	ΠN
•	Did you have any gambling winnings or losses, including lottery, bingo and raffles? (If yes, attach W2-G)	□ Y	□ N
•	Did you receive, sell, exchange or dispose any virtual currency?	□ Y	□ 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? <b>(If yes, attach Form 1099-R)</b>	ΠY	□ 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:)	ΠY	□ N
•	Did you make any contributions to a retirement plan such as a pension, 401K, IRA, SEP, SIMPLE in 2023?	Π Υ	
•	Did you convert an IRA to a Roth IRA or perform a Backdoor Roth IRA in 2023?	ΠY	

## HEALTH INFORMATION

•	Did you purchase health insurance from the Healthcare.gov Marketplace in 2023? (If yes, attach Form 1095-A)	Δ Υ	□ 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)	Δ Υ	ΠN
•	Did you/ spouse/dependent incur a substantial amount of unreimbursed medical expenses in 2023?	Δ Υ	□ N

# HOUSING INFORMATION

•	Do you own a home? (If yes, attach Form 1098 – Mortgage Interest and 2023 Property Tax Statement)	□ Y	□ N			
•	Did you rent during 2023? If yes and total household income is less than \$67,300, answer the following:					
	a. Name and address of Landlord:					
	b. Monthly rent paid in 2023:					
	c. Number of months rented:					
	d. Is Heat included in your rent payment?	□ Y				
•	Did you sell and/or purchase a home in 2023 or 2024? (If yes, attach Closing Disclosure & 1099-S)	Δ Υ	□ N			
•	Did you receive rent from real estate or other property? (If yes, attach support for income and expenses)	Ο Υ	ΠN			
•	Was your principal home or rental property foreclosed on in 2023 or 2024? (If yes, attach 1099A or 1099C)					
•	Did you make any energy efficient improvements to your home in 2023? (If yes, list amount \$)					

CHILD AND DEPENDENT CARE						
•	Did you receive dependent care benefits from your employer in 2023?					
•	• 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:					
	Name of Child Care Provider: Provider EIN/Social Sec	urity Nu:	mber:			
	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)	□ Y	□ N			
•	Did you, your spouse or a dependent receive scholarships or grants for higher education in 2023?	Δ Υ	□ 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.)					
•	Did you make any contributions to a 529 Plan or Education Savings Plan in 2023? (Attach support)	Δ Υ	□ N			
•	Did you pay any Student Loan Interest in 2023? (If yes, attach Form 1098-E)	Π Υ	□ N			
	ITEMIZED DEDUCTIONS					
	<b>He:</b> The IRS allows taxpayers to reduce their income by taking the higher of the Standard Deduction or Itemized De 23, the standard deduction is \$13,850 for Single Filers, \$20,800 for HOH and \$27,700 for Married Filers.	ductions	s. For			
•	Did you make charitable contributions in 2023? (If yes, attach receipts or acknowledgements from charity, cancelled check or other proof)	□ Y	□ N			
•	Did you use your vehicle to provide volunteer services to a charity?	Δ Υ	□ N			
•	Did you pay state taxes on new vehicle purchased or monthly lease in 2023?	Π Υ	□ N			
	List your vehicle registration fees. \$					

		-	•			
•	Did you	owe State or Local	taxes when you fil	led your 2022 Income Tax Return? If yes, please list amount paid in	ΠY	
	2023: \$_					

	MISCELLANEOUS QUESTIONS			
•	Did you purchase a new or used plug-in Electric Vehicle in 2023? If so, please list the make, model, vehicle's Vehicle Identification Number (VIN), purchase date and cost of vehicle on line below:	icle's		
•	<b>Michigan Residents Only:</b> Did you make any contributions to a Michigan First-Time Home Buyers Saving Program in 2023? If yes, please list the bank name, account number and beginning & ending bank balance:	\$		
•	Did you work from home in 2023? If your employer is located in a city or state outside of your home location, you may qualify for a refund of city or state taxes paid. <i>Please list dates you worked from home in "Other Information" Section below.</i>	□ Y	ΠN	

#### **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:
 / /

	<b>Business Miles Driven in 2023</b>	Commuting Miles Driven in 2023	Other Miles Driven in 2023		
•	Do you have written evidence to support your vehicle expenses? Please list the following:				$\Box$ N
•	Did you use your vehicle for your business?				$\Box$ N
•	Do you have records to support your business expenses? If yes, please attach receipts, $\Box$ Y				
•	Did you pay estimated taxes in 2023?				
•	Did you materially participate in this business in 2023?				
	, ,				

			FILIN	IG QUESTIC	NS						
•	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?					□ Y	□ N				
•	If yes, please provide the following information:										
	Name of Bank Bank Routing Number Bank Account Number			nber	Type of Account						
				Cheo	ecking 🗆 Savings						
				cking	king 🗆 Savings						
							🗆 Cheo	cking	🗆 Savin	gs	
Select type of Tax Return Copy for your personal f			les:	Electronic Copy     Pape		per Copy with Folder					
Но	w did you hear about Berkshi	ire Tax Services?	🗆 Famil	ly/Friend (List N	lame):						
	□ Google/Website Search □ Other (List Source):										

## QUESTIONS, COMMENTS AND OTHER INFORMATION