

# BERKSHIRE TAX SERVICES, LLC 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	<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? <b>(If yes, list details in "Other Information" Section on page 3)</b>	<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? <b>(If yes, attach Form W-2 and/or 1099-NEC)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive any Unemployment Compensation in 2023? <b>(If yes, attach 1099-G)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive any Social Security benefits during 2023? <b>(If yes, attach Form SSA-1099)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you sell any Stocks/Investments in 2023? <b>(If yes, attach 1099-B)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive Interest Income from a savings account or dividends from mutual funds/investments? <b>(If yes, attach Form 1099-INT and/or 1099-DIV)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you have any gambling winnings or losses, including lottery, bingo and raffles? <b>(If yes, attach W2-G)</b>	<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? <b>(If yes, attach Form 1099-R)</b>	<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? <b>(If yes, list reason: _____)</b>	<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
• Did you convert an IRA to a Roth IRA or perform a Backdoor Roth IRA in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N

### HEALTH INFORMATION

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

### HOUSING INFORMATION

• Do you own a home? <b>(If yes, attach Form 1098 – Mortgage Interest and 2023 Property Tax Statement)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you rent during 2023? If yes and total household income is less than \$67,300, answer the following:	<input type="checkbox"/> Y	<input type="checkbox"/> N
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?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you sell and/or purchase a home in 2023 or 2024? <b>(If yes, attach Closing Disclosure &amp; 1099-S)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive rent from real estate or other property? <b>(If yes, attach support for income and expenses)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Was your principal home or rental property foreclosed on in 2023 or 2024? <b>(If yes, attach 1099A or 1099C)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you make any energy efficient improvements to your home in 2023? <b>(If yes, list amount \$_____)</b>		

### 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
<b>Name of Child Care Provider:</b>	<b>Provider EIN/Social Security Number:</b>	
<b>Provider Address</b>	<b>Amount Paid to Provider</b>	
	\$ _____	

### 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? <b>(If yes, attach 1098-T and support for expenses)</b>	<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? <b>(If yes, attach Form 1099-Q.)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you make any contributions to a 529 Plan or Education Savings Plan in 2023? <b>(Attach support)</b>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you pay any Student Loan Interest in 2023? <b>(If yes, attach Form 1098-E)</b>	<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? <b>(If yes, attach receipts or acknowledgements from charity, cancelled check or other proof)</b>	<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 registration fees. \$ _____		
• Did you owe State or Local taxes when you filed your 2022 Income Tax Return? If yes, please list amount paid in 2023: \$ _____	<input type="checkbox"/> Y	<input type="checkbox"/> N

