

# BERKSHIRE TAX SERVICES – 2023 RETURNING CLIENT QUESTIONNAIRE

## SECTION 1: TAXPAYER INFORMATION

<b>Taxpayer Last Name:</b>	<b>First:</b>	<b>Email Address:</b>
Preferred Method of Contact:		
Home Phone <input type="checkbox"/>		Cell Phone <input type="checkbox"/>
Email <input type="checkbox"/>		Text <input type="checkbox"/>

## SECTION 2: ADDRESS CHANGE

If your address changed in 2023, complete this Section. If not, go to Section 3.

<b>Street Address:</b>	<b>Apt. #:</b>
<b>City:</b>	<b>State:</b>
<b>Zip Code:</b>	
Did you buy/sell a home in 2023? <input type="checkbox"/> Y <input type="checkbox"/> N (If yes, include copy of Closing Disclosure Form)	

## SECTION 3: MARITAL AND FAMILY CHANGES

If you had any marital or family changes in 2023, complete this Section. If not, go to Section 4.

Select the option that best describes your marital status in 2023:	<input type="checkbox"/> Married	<input type="checkbox"/> Divorced
	<input type="checkbox"/> Separated	<input type="checkbox"/> Widowed

Were there any births, deaths, or adoptions in your immediate family in 2023?  Y  N

<b>Name:</b>	<b>Date of Birth:</b>	<b>Date of Death:</b>	<b>Social Security Number:</b>

## SECTION 4: INCOME INFORMATION

Please check off the items of income that you received in 2023

<input type="checkbox"/> Wages (include W-2)	<input type="checkbox"/> Unemployment Compensation (include 1099-G)
<input type="checkbox"/> Interest Income (include 1099-INT)	<input type="checkbox"/> Gambling Winnings (include W2-G)
<input type="checkbox"/> Dividends/ (include 1099-DIV)	<input type="checkbox"/> Independent Contractor (include 1099-NEC/MISC)
<input type="checkbox"/> Investment Sales (include 1099-B)	<input type="checkbox"/> Rental Income (include 1099-MISC or support)
<input type="checkbox"/> Social Security (include SSA-1099)	<input type="checkbox"/> Receipt or Sales of Digital Assets/ Cryptocurrency
Other: _____	

## SECTION 5: RETIREMENT/HEALTH CARE INFORMATION

Did you or your spouse receive payments/distributions from a retirement plan such as a pension, 401K, or 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 an early distribution from a retirement plan to pay medical bills, for college or to purchase a home? (If yes, list reason: _____)	<input type="checkbox"/> Y	<input type="checkbox"/> N
Did you purchase Health Insurance from the Marketplace? (Attach Form 1095-A)	<input type="checkbox"/> Y	<input type="checkbox"/> N
Did you participate in a Health Savings Account (HSA) in 2023? (If yes, attach Form 1099-SA and 5498-SA)	<input type="checkbox"/> Y	<input type="checkbox"/> N

## SECTION 6: RENTERS

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
Name and Address of Landlord:		
Monthly Rent Paid in 2023:		Number of Months Rented:

## SECTION 7: CHILD AND DEPENDENT CARE

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#</b>	
<b>Provider Address</b>	<b>Amount Paid to Provider</b>	

## SECTION 8: TAX DEDUCTIONS

<input type="checkbox"/> College Tuition (include 1098-T)	<input type="checkbox"/> Mortgage Interest (include 1098)
<input type="checkbox"/> Student Loan Interest (include 1098-E)	<input type="checkbox"/> Property Tax Statements
<input type="checkbox"/> Contributions to 529 Education Plan	<input type="checkbox"/> Charitable Contribution Receipts
<input type="checkbox"/> Vehicle Registration Fees _____	<input type="checkbox"/> Gambling Losses (if you had winnings)
<input type="checkbox"/> Energy Efficient Home Improvements	<input type="checkbox"/> Purchase of Electric Vehicle
<input type="checkbox"/> Unreimbursed Medical Expenses (if total amount paid is over 7.5% of your income)	
<input type="checkbox"/> Contributions to Michigan First-Time Home Buyer Savings Program in 2023	

## SECTION 9: FILING INFORMATION

Did you receive a 6-digit IRS Identity Protection PIN Number? You can check to see if you were issued a PIN by visiting your <a href="#">IRS Online Account</a> .	<input type="checkbox"/> Y	<input type="checkbox"/> N
The IRS is able to deposit refunds directly into up to (3) taxpayer's accounts. If you receive a refund, would you prefer to have your funds direct deposited?	<input type="checkbox"/> Y	<input type="checkbox"/> N
If yes, please confirm that the bank account used on your 2022 Tax Return is still valid. If not, please enter updated account information below:		
<b>Bank Name</b>	<b>Routing Number</b>	<b>Account Number</b>
		<b>Type of Account</b>

## ADDITIONAL INFORMATION, COMMENTS, QUESTIONS