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If any of the following items pertain to you or your spouse for 2022,
please check the appropriate box and provide additional information if necessary.

Taxpayer Name: _____ **Spouse Name:** _____

YES NO

- Would you and your spouse like to donate to the Presidential Election Campaign?
- Did you acquire, use, dispose of or hold any virtual currency/cryptocurrency (such as bitcoin)? If yes, provide details.
- Did you or any of your dependents receive an **Identify Protection PIN (IP PIN)** in 2022 or prior years? If you received an IP PIN provide a copy of the IRS notice. *NEW IP-PINs issued each year*
Taxpayer: _____ Spouse: _____ Dependents: _____
- Did your address change during the year? If yes, provide current address here:

- Provide County of residence and work as of **1 / 1 /2022**.
Taxpayer: County of Residence: _____ County of work: _____
Spouse: County of Residence: _____ County of work: _____
- Any change in marital status (marriages, separations, divorces, or deaths occur related to you or your spouse) or filing status as of December 31, 2022, if yes, please note: _____
- Did any births or adoptions occur in 2022 related to you or your spouse? If any new dependents are being claimed this year, please provide the following information:
Name _____
Date of birth _____
Social Security Number _____
Relationship to Taxpayer _____
- Could you be claimed as a dependent on another person's tax return?
- If you don't claim all your dependents every year, please list out all the dependents you are claiming on your 2022 taxes.

- Were any of your unmarried children who might be claimed as a dependent 19 or older and were NOT enrolled as a student in 2022? If so, please list the dependent's name.

- Did any of your dependent children under age 19 or full-time students under age 24 at the end of 2022, have interest or dividend income in excess of \$1,150 or total investment income in excess of \$2,300?
- If yes, do you want us to prepare your child's tax return?

Taxpayer Name: _____

Spouse Name: _____

YES NO

- Were you notified or audited by either the Internal Revenue Service or a State taxing agency? If yes, provide a copy of the notice, if you haven't already.
- May the IRS discuss your tax return with your preparer?
- Did you start a business in 2022? If yes, please fill out the attached Business Questionnaire.
- Did you or your spouse make any gifts to an individual that total more than \$16,000 or any gifts to a trust in 2022?
- Did you have any debt canceled, forgiven, or discharged in 2022 (i.e.: Student Loan). If so, please provide Form 1099-C "Cancellation of Debt" from the lender that forgave the debt.
- Did you have an interest in, or other authority over, any foreign assets or accounts, including bank, securities, or trusts?
- Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?
- Were you a resident of, or did you have income from more than one state during the year? If so, provide details. You may be required to file a tax return/owe tax in those states.

*** Additional fees will be assessed for each additional state tax return required to be filed. ***

- Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If yes, provide a copy.
- Did you receive a form 1095-A and have a child that you claim on your tax return file their own tax return? If yes, provide a copy of their return (If we did not prepare). All income for the household must be reported for insurance purchased by the Marketplace (exchange).
- Did you make contributions **other than through payroll deduction** to a health savings account (HSA)? If yes, provide Form 5498-SA showing your contribution.
- If you made contributions to a health savings account (HSA) but did not reach the maximum for the year, would you like to discuss the tax savings of maximizing your 2022 contributions before April 18th?
 - Who holds the HSA plan?
 - Taxpayer
 - Spouse
 - Is the HSA plan a family or single plan?
 - Family Plan
 - Single Plan
- Did you take any distributions from an HSA? If yes, provide Form 1099-SA.
 - Was all the money used for qualified medical expenses? Yes No
- Did you pay for health insurance (other than withheld pre-tax from your paycheck)? If yes, provide annual amount paid. Taxpayer \$_____ Spouse \$_____
- Did you receive any disability income? If yes, provide Form W-2, SSA-1099 or other tax document filed with the IRS reporting your income.
- Did you receive any unemployment compensation? If yes, provide Form 1099-G.
- Did you buy or sell any stocks, bonds or other investment property? If yes, attach brokerage tax statement.

Taxpayer Name: _____

Spouse Name: _____

YES NO

- Did you purchase, sell, or refinance your principal home or second home? If yes, provide the settlement sheet (Closing Disclosure) and Form 1099-S. If any of your mortgage interest deductions are from a home equity loan, please specify on the Form 1098.
- Did you make any residential energy-efficient improvements (remodel or new construction) to your home? If yes, provide details/invoices.
- For any property you own, did you purchase and place in service any solar water heating, solar electric, fuel cells, small wind energy or geothermal heat pump? If yes, please provide details/invoices.
- Did you purchase any energy-efficient or plug-in electric vehicle? If yes, provide the purchase invoice.
- Did you receive a distribution from a retirement plan (401(k), IRA, etc.)? If yes, provide Form 1099-R.
- Did you transfer or rollover any amount from one retirement plan to another retirement plan? If yes, provide Form 1099-R.
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2022? If yes, provide Form 1099-R.
- Did you make any charitable contributions directly from your retirement account? If so, provide statement from financial institution showing donated amount.

- Did you make a 2022 contribution to an IRA or SEP, **other than through wage deduction at work?** If yes, please provide the date and amount paid for you and spouse, if applicable.
Be sure to list the type of contribution (Traditional IRA, ROTH IRA, SEP)

Taxpayer: Date _____ \$ _____ Type: _____

Spouse: Date _____ \$ _____ Type: _____

- Would you like to make an IRA contribution (traditional or ROTH) for 2022 before April 18th if you haven't already? If you answer yes, we will contact you to discuss your options and potential savings.

- Did you pay for childcare or preschool for dependent children under the age of 13? If yes, please provide a statement with the following information or note below:

Name of Childcare Business/Individual: _____

Tax ID # / SSN: _____

Address: _____

Amount paid for each child: _____

Taxpayer Name: _____

Spouse Name: _____

Refund / Estimated Taxes

YES NO

- If you would like direct deposit for a potential refund, please provide a copy of a voided check or list the following **OR** check the box with "bank information same as last year"

- Checking Savings

Name of Bank _____

Routing Number _____

Account Number _____

- Bank information is the same as last year – no change

- Were estimated tax payments made quarterly? If yes, provide the dates and amounts paid:

Quarter 1 Federal \$ _____ State \$ _____ Date Paid _____

Quarter 2 Federal \$ _____ State \$ _____ Date Paid _____

Quarter 3 Federal \$ _____ State \$ _____ Date Paid _____

Quarter 4 Federal \$ _____ State \$ _____ Date Paid _____

- If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated taxes (instead of being refunded)?

- Do you expect your 2023 taxable income and withholdings to be different from 2022? If so, please note changes below.

Taxpayer Name: _____

Spouse Name: _____

Indiana Tax Credits

YES NO

- Did you and your spouse receive the combined \$325 automatic taxpayer refund issued during 2022? If not, you or your spouse may be eligible for a \$200 automatic taxpayer refund, pending eligibility requirements are met. Please list amounts received:
Taxpayer: _____ Spouse: _____
- Did you, as a **licensed educator** (teacher, librarian, counselor, principal, superintendent or aide that worked at least 900 hrs.), spend up to \$300 on classroom supplies that was not reimbursed? Total unreimbursed expenses: Taxpayer \$ _____ Spouse \$ _____

If yes, were you employed by an Indiana school corporation?
Taxpayer: Yes No Spouse: Yes No
- Did you make a charitable contribution to any Indiana college? If so, please provide a statement verifying your contribution that includes the following:

Name of College _____ Contribution \$ _____ Date Paid _____
- Did you or your spouse donate to a Scholarship-Granting Organization (SGO) during 2022? If so, please provide statement or list out SGOs and amounts contributed. _____
- Did you pay rent for your residence, in Indiana? If yes, provide the following:
Total Rent paid in 2022 \$ _____
Number of months rented _____
Landlord name and address _____
Address of location rented _____
- Did you pay property taxes on your **principal residence**? If yes, provide amount paid:
\$ _____ (DO NOT include property tax paid on rental properties or other business assets)
- Were you or your spouse on Medicaid AND living in a hospital, skilled nursing facility, intermediate care facility, licensed county home, license boarding or certified Christian Science facility?
- If you paid premiums for an **Indiana Long-Term Care Partnership Policy**, please provide the total amount of premiums paid in 2022. \$ _____
- Did you contribute to an **Indiana College Choice 529** savings plan? Please provide a statement showing your contribution and **account number** for each plan.
Were or will funds be used to pay for:
 K-12 Education OR Post-Secondary School (trade school, college)
- Did any of your dependents go to **private school** or did you **home school** for K-12 in 2022?

Provide number of dependent's attending private/home school: _____

Name of Private School _____

Taxpayer Name: _____

Spouse Name: _____

College

YES NO

- Did you pay any student loan interest? If yes, provide **Form 1098-E**
- Did you, your spouse, or a dependent pay any college expenses (including tuition, books, computer, internet) to attend a college, university or vocational school? If yes, provide a statement listing payments made for tuition and fees (even if paid from a student loan or 529 plan). List any scholarships or grants received. Also provide **Form 1098-T** from the institution.

Student's Name _____

Tuition Paid \$ _____

Required Books and Supplies \$ _____

Scholarships/Grants \$ _____ Years in College _____

Student's Name _____

Tuition Paid \$ _____

Required Books and Supplies \$ _____

Scholarships/Grants \$ _____ Years in College _____

- Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? If so, provide **Form 1099-Q**.

Taxpayer Name: _____

Spouse Name: _____

BUSINESS / FARM / RENTAL
Schedule C / Schedule F / Schedule E

YES NO

- Did you start a new business in 2022 or create any new entities (ex. LLC)?
If yes, please provide articles of organization and EIN for the LLC or information regarding the new business.

- Was your home rented out or used for business? If yes,
Business square footage _____
Home total square footage _____

- Did you use your car on the job (other than to and from work)? If yes,
Business mileage in 2022 _____
Total mileage in 2022 _____
Car make/model and year _____

- Did you trade in, purchase, or dispose of any business assets (equipment, vehicles, real estate, etc.), or convert any personal assets to business use? If so, provide invoice. Use attached business asset listing (if applicable) to mark disposed items.

- Did you exclude from meals your non-deductible entertainment expense?
***List out **business restaurant meals** separately, as those are temporarily 100% deductible beginning January 1, 2022 – December 31, 2022.
Normal meals (groceries) are still only 50% deductible.*

- Did you pay employees wages while they were on family and medical leave? If so, what amount was paid? \$ _____

- Did your business pay any individual \$600 or more during 2022 for services (ex. contract labor, custom hire, repairs, trucking, professional services) that would require a 1099 to be filed? If self-prepared, please provide a copy of the 1099(s) issued.

If yes, was the 1099 prepared by: Bohman CPA Group or Self-Prepared?

- If your business has payroll and we do not prepare your W-2s, please provide a copy of your W-3 and W-2s.

- If you received an EIDL advance, please provide correspondence that states whether it is a loan or grant.

