

Individual Client Questionnaire

Full Name: _____

12324 Hampton Way Drive, Suite 201 | Wake Forest, North Carolina, 27587

Are you submitting more than one return today?
(i.e.: a return for another relative, a business, or a trust, etc.) Yes No

Do you think you will owe this year? If so, how much? \$ _____ (FED) \$ _____ (NC) Yes No

Did you buy or sell property in 2022? If yes, we need closing documents. Yes No

Did you buy a vehicle last year? Yes No

Did you receive health insurance through the government marketplace?
*If yes, we need a copy of **Form 1095-A**.* Yes No

At any time during 2022, did you (a) receive (as a reward, award, or payment for property or services, or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Yes No

Did your marital status change during the year? *Explain:* _____ Yes No

Were there any changes in dependents from the prior year?
If yes, explain: _____ Yes No

Did you pay any childcare expenses for children 12 or younger? *Please provide documentation.* Yes No

Did your address change from last year? *If so, please provide your new address.* Yes No

Did you make estimated tax payments (not W-2 withholdings)? Yes No
If yes, provide dates and amounts paid.

Federal: Date: _____ Amount: _____ Date: _____ Amount: _____
Date: _____ Amount: _____ Date: _____ Amount: _____

State: Date: _____ Amount: _____ Date: _____ Amount: _____
Date: _____ Amount: _____ Date: _____ Amount: _____

Were there any changes to routing or account numbers for your bank account that was used to direct deposit or draft for your return in the last year? Yes No

Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? *If yes, attach the **IRS letter**.* Yes No

Did you make any withdrawals (such as RMDs) from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? Yes No