

SpoonCPA Questionnaire

2023

Please complete this form and bring a copy to your appointment.

Your name: _____

Did your filing status change during 2023? Yes No

Will the address on your Federal return be different from the one shown on your return? Yes No

If YES, enter the new address:

Street: _____

City: _____

State: _____ ZIP Code: _____

Were you notified by the Internal Revenue Service or any other taxing authority of changes to a prior year tax return? (If YES, please enclose report notifying you of the change(s).) Yes No

Did you have minimum essential health care coverage for yourself, your spouse (if filing jointly), and anyone you could or did claim as a dependent for every month of 2023? Yes No

Did you, your spouse, or a dependent enroll in health insurance through the marketplace/exchange? Yes No

Are you aware of any changes to your income, deductions and credits reported on a prior year return? Yes No

Did you sell and/or purchase a principal residence in 2023? Yes No

Did you receive any insurance or other reimbursement from a prior year medical, casualty, or theft loss deduction? Yes No

Do you have any dependent children under 18 who received unearned income (interest, dividends, investment income) of over \$1,900? Yes No

If YES, and if your child qualifies, do you elect to report your child's interest and dividends in your income tax return? Yes No

Did you or your spouse receive stock from an employer's stock bonus plan (do not include amounts reported on Form W-2)? Yes No

Did you buy or sell any bonds during the year? (If YES, please provide a copy of the broker's report.) Yes No

Did you start a new business during 2023? Yes No

Did you receive payments from a pension or profit-sharing plan? Yes No

Did you sell business or personal property(ies) on the installment method, OR did you receive payments from an installment sale? (If YES, please provide details) Yes No

Did you surrender any U.S. savings bonds during 2023? Yes No

Did you use the proceeds from Series EE U.S. savings bonds purchased after 1989 to pay for higher education expenses? Yes No

- Did you receive tip income NOT reported to your employer? Yes No
- Did you receive any tax-exempt interest? Yes No
- Did you obtain a loan and use the proceeds for an investment? Yes No
- If employed, are you covered under a pension, profit-sharing, stock bonus or other retirement plan? Yes No
- Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? Yes No
- Did you rollover any amount from a Traditional IRA to a Roth IRA during 2021, 2022, or 2023? Yes No
- Did you receive any disability payments this year? Yes No
- If either you or your spouse are self-employed, are either of you covered under an employer's health plan at another job? Yes No
- Did you have foreign income or pay any foreign taxes in 2023? Yes No
- Did you sell property or equipment on installment in 2023? Yes No
- Did you have any business related educational expenses? Yes No
- Did you make gifts of more than \$15,000 to any individual? Yes No
- Did you make gifts to a trust? Yes No
- Did you suffer an uninsured casualty or theft loss on a non-business property? Yes No
- Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are paid to beneficiaries named by you? Yes No
- Did you receive any income not included in the Tax Organizer? Yes No
- Did you pay any qualifying education expenses for yourself or any dependents? Yes No
- Do you have any financial interests in excess of \$10,000 in a foreign country? Yes No
- Did you hold/buy/sell any cryptocurrency during 2023? Yes No

Additional Notes:

Please make certain to report all income received in 2023. If you received income that is not included in this proforma organizer, attach a schedule listing the income received. Also, describe the nature of the income received (type of income, how received, etc.).