

2022 Questionnaire

Name(s): _____ Best Phone: _____

Changes to Email: _____

Direct Deposit

- Changes in bank account or different from last year: **Please send voided check.**
- If no changes please verify: Bank Name: _____ Last four digits of acct: _____

HOUSEHOLD/DEPENDENT INFORMATION

Y N

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address, e-mail, or phone number change during the year? Please provide updates. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any changes in dependents during the year? If yes, please explain. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any childcare expenses during the year? Please provide documentation. |

HEALTH CARE INFORMATION

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did any member of your household have healthcare coverage through Marketplace? If yes, please provide copies of Form 1095-A . |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any distributions from a Health Savings Account (HSA)? Please provide documentation |

EDUCATION INFORMATION

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay college tuition for anyone in your family?
If yes, please provide Form 1098-T . |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year? Please provide documentation. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay Student Loan Interest for yourself, spouse, or dependent(s) during the year? Please provide Form 1098-E . |

MISCELLANEOUS INFORMATION

If you paid real estate taxes or rent in 2022, please provide documentation and list amount:

Real Estate Taxes Paid: _____ Rent Paid: _____
Does rent include heat?) Y N

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you contribute to a ROTH IRA for 2022? If so, please provide documentation and amount. _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive, sell, exchange, gift or otherwise dispose of financial interest in digital assets? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any energy-efficient improvements to your main home during the year and have not Claimed the energy credit before? Please send the invoice paid in 2022. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your driver's license/state ID expire? If so, please upload a copy of your new one. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any online purchases where WI sales tax was not assessed? If so, how much? _____ |

QUESTIONS FOR YOUR PREPARER:

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