Nine Name

TAXES MADE SIMPLE, INC.Office: (330) 494-9659 Fax: (330) 494-9657

Office: (330) 494-9659 Fax: (330) 494-9657 3056 Raymond St NW, Uniontown, OH 44685 www.TaxesMadeSimple. com Date dropped off:_____

Client Name: Tax	x Year	: 2023	3
** Do you want your return expedited? Fee of \$45 is added to tax preparation. Yes / No I	nitial:		
** For this year's tax return, would you like a copy as a PDF or on CD (Cost of \$10)? Yes / No I	nitial:		
** Do you need to have the Tax Preparation Fee deducted from your Federal Refund? Yes / No 1			
If Yes, Bank Processing fees are \$64.90 added to the tax preparation fees. Signature:			
11 1es, Bank 110ccssing fees are \$0 1120 accept to the tax preparation fees. Signature.		Unsur	
*Would you like to have your Refund direct deposited ? (confirm account information)(no fee)	O		O
*If you have a <u>Balance Due</u> , can we withdrawal a balance due automatically from a bank account? Date of Withdrawal? Initial: (no fee for withdrawal)	0	0	0
Personal Information			
1- Did your Marital Status change during the year? Single/Married/Divorced/Widowed/Separated 2- Did your Residence change during the year? If so, when move?	00	00	00
3- Can <u>you be claimed</u> as a dependent by another taxpayer? (ie. Can parents claim you?)	=	0000	0
5- Do you want to allocate \$3 of your tax to the Presidential Election Campaign Fund?	_	Ŏ	00000
7- Were there any changes in dependents from the prior year? (New child/ claiming parent)	\cap	\bigcirc	\bigcirc
8- Do you have any children under age 18 with Interest, Dividends, Capital Gains?	Ō	\circ	8
10- Did you maintain a home for someone not claimed as a dependent? (ie. Parent)		\cap	\bigcirc
11-Did you contribute to an Ohio 529 College Plan ? If yes, Provide Year End Statement	_	\simeq	ŏ
Healthcare Information	0	\cup	\cup
12-Did you pay Health Insurance Premiums directly for yourself/family: \$	\bigcirc	\bigcirc	\bigcirc
13-Did you receive a Healthcare Premium Assistance or "Marketplace" Assistance? Form 1095-A		Ŏ	Ŏ
14-Do you have a Health Savings Account (HSA) ? If yes, Provide Form 1099-SA	Ŏ	Ŏ	Ŏ
Income Information (Investments - Stocks - Foreign Accounts)	_	_	_
15-Do you have any stock investments/brokerage account/investment accounts?	0	0	0
If yes, provide year-end tax Forms 1099-INT, 1099-DIV, & 1099-B			
16-Did you dispose of any stock during the year? Provide 1099-B	_	\circ	\circ
17-Do you have a stock option? Was there any exercised this year?	0	\circ	\circ
If yes, bring brokerage tax form 1099s and original cost and date.	_	_	
18-Did you have any Foreign Income or <u>pay any Foreign Taxes</u> ?	\circ	\circ	\circ
19-At any time during 2023, did you receive, sell, exchange, or otherwise acquire any financial	_	_	_
interest in any Digital Assets (ie. BITCOIN)? If so, provide printout of activity	Q	Q	Ō
20-Do you have any Foreign Bank Accounts, Retirement Accounts, Property?		Ŏ	Ō
21-Did you cash in any U.S. Savings bonds? If yes, provide Form 1099-INT from bank	\circ	\circ	\circ
Other Income (Retirement - Alimony - Unemployment - Business & Other)	_	_	_
22-Did you make any Rollovers or Withdrawals from any Retirement Account?	_	Ō	Ō
23-If you reached Age 73, did you withdraw your Required Minimum Distribution (RMD)?	Ō	Ō	ŏ
24-If you took your Required Minimum Distribution (RMD), did you participate in the Qualified	\circ	\circ	\circ
Charitable Distribution (QCD)? If so, need statement of organization & amount		_	_
25-Did you receive Social Security Benefits such as Retirement, Death, or Disability?		Õ	Ō
26-Did you Receive or Pay Alimony (not child support)? If yes, provide activity for year	Ō	00	Õ
27-Did you receive any Unemployment or Disability Income ? If yes, provide 1099 Tax Form	Ŏ	Ŏ	000
28-Did you start or dispose of a business during the year? Receive any Form 1099-NEC/MISC?		0	0

Other Income (Retirement - Alimony - Unemployment - Business & Other) Continued 29-Did you purchase/earn a new interest in any Partnership or S Corporation?	Yes/Unsure/No		
** Tax Form 7203 required for all Owner Basis for Partners/S Corporations			
30-Did you sell, exchange, or purchase any real estate/property during the year?	\bigcirc	\bigcirc	\bigcirc
If yes, provide closing Settlement Statement/HUD Statement/Final Disclosure Statement.			
31-Did you receive employer-provided educational assistance?	\bigcirc	\bigcirc	\bigcirc
32-Did you receive a damage award for personal injury or sickness?		Ŏ	Ŏ
33-Did you have any Cancellation of Debt during this last year? If yes, provide 1099-C & 1099-A	Ŏ	0000	Ŏ
34-Did you have your Home Foreclosed during the tax year? Or did you receive a Form 1099-A?	Ō	Ŏ	Ō
35-Did you receive any Lottery Winnings ? If yes, provide W-2G form	Ō	Ō	Ō
Provide any Lottery losses only in the same year as the winnings are claimed.		_	_
Deduction Information			
36-Are you a Teacher who has unreimbursed supplies? If yes, amount: \$	\circ	\circ	\circ
37-Did you pay any student loan interest this year? If Yes, Provide Form 1098-E	\circ	\circ	\circ
Itemized Deduction Information	_		
38-Did you have Medical Expenses ? (Co-pays, vision, dental, prescriptions, mileage, etc.)		Ō	Ō
	\circ	0	\circ
40-Did you have a Mortgage, Home Equity Loan, Line of Credit, or Refinance any	_	_	_
property this year? If yes, provide Closing Statement and/or Mortgage Interest Statement	\circ	\circ	\circ
Retirement Contributions (Funds put in)	\sim	\sim	\sim
41-Did you start a new retirement or pension plan this year?		000	\odot
42-Did you put funds into any Roth or Traditional IRA contributions? (provide statement)	\otimes	\supset	\otimes
43-Have you ever made a non-deductible IRA contribution?	\simeq	\simeq	\simeq
Credit Information	\cup	\cup	\cup
45-Did your College Student receive educational benefits? Provide Form 1098-T along			
with a history of payments, books, and supplies paid for during Tax Year 2023	\bigcirc	\bigcirc	\bigcirc
46-Did you pay for child care (babysitting, day care – provide statement from provider)	Ŏ	Ŏ	Ŏ
If yes, provide provider name, address and Social Security number/EIN and amount paid per child	_	•	•
47-Have you started any Adoption process? If so, what have you spent towards adoption?	0	0	0
Miscellaneous Information	_		
48-Did you pay any quarterly payments/estimates to IRS, State, or City? List provided?	Q	Ŏ	Ŏ
49-Did you receive any Notices/Correspondence from federal, state, or local tax authorities?	\otimes	\otimes	\otimes
50-Did you make gifts of more than \$17,000 to any individual during 2023?	\simeq	00000	\otimes
52-Did you file for Bankruptcy or have a discharge from Bankruptcy last year?	\simeq	\simeq	\simeq
53-Do you expect significant changes in income, expenses or dependents for 2024 or 2025?		\simeq	\simeq
Use this space provided for any "YES" answers or Questions for Preparer		<u> </u>	