

2023 Client Check List

Print Name _____

Did you have more than \$10,000 in a foreign account at any point in 2023?

Yes No **Initial** _____

If yes, need transaction details for the tax year

Are you a co-signer and/or a co-owner of a foreign account that had \$10,000 at any point in 2023? Yes No **Initial** _____

If yes, need transaction details for the tax year

At any time during 2023, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?

Yes No **Initial** _____

If yes, need transaction details for the tax year

Office Use Only
____ Driver's License
____ E Signature
Docs- Mail Pickup
Call Emailed Pickup

Address Changes?

Yes No **If yes**, please list _____

Did you sell any real estate in 2023?

Yes **If yes**, please provide closing documents (1099-S) No

Marital Status Changes as of 12/31/2023 (must use name as it appears on your SS card)?

Yes No

If yes, please explain _____

Dependent Additions/Removals (provide DOB, copy of SS card and sex for additions)?

Yes No Boy or Girl

If yes, please explain _____

Did you make a contribution to a Traditional or Roth IRA that is **NOT** an employer sponsored plan?

(Example: 401k, 403b, SIMPLE IRA) Yes **If yes**, provide proof of transaction No

Did you have Health Savings Account (HSA) withdrawals in 2023?

Yes **If yes**, 1099SA required for tax return No

Any student loan interest paid in 2023? **Need 1098-E form**

Amount Paid for Vehicle Registration (**NO** trailers, RV's or motorcycles) _____

Public School Fees (School Sponsored Activities) _____

County of Residence _____/School District of Residence _____

Tax return copy preference? **Email (free)** **USB (\$5 fee)** **Paper (\$5 fee)**

Primary Contact Name & Email Address: _____

Spouse Name & Email Address: _____

Primary Contact Phone: _____ **Spouse Phone:** _____

*****Drop Off Deadline March 25th for Timely Filing*****