CRM Tax Services Questionnaire - 2023 Tax Year

Please attach a clear copy of your Driver's License (and spouse) as well as copies of each dependent(s) Social Security Card(s) to this questionnaire.

Today's Date:____________________

For New Customers, who referred you to CRM Tax Services? ____

Taxpayer: ____ **Social Security:**______________________

Spouse: ____ **Social Security:**______________________

Tax Payer Occupation: ___________________________ **Spouse Occupation:**_____________________

Home Address: ____

Email Address: ____

Daytime Phone: ___________________________ **Evening Phone:**___________________________

Taxpayer Date of Birth: ______________________ **Spouse Date of Birth:** ______________________

Filing Status: ☐Single ☐Married filing jointly ☐Married filing separately ☐Head of Household ☐Qualifying Widow

Is tax payer a (check one): ☐Citizen ☐Resident Alien ☐Other **Is Spouse a:** ☐Citizen ☐Resident Alien ☐Other

Country of Origin *IF* checked Resident Alien or Other Above ________________________________

1. **Can you be claimed as a dependent by anyone?** ☐ **Yes** ☐ **No**
2. **Did you buy or sell any cryptocurrency in 2023 (Bitcoin, Ethereum, etc)?** ☐ **Yes** ☐ **No**
3. **Is your health insurance through the Marketplace?** ☐ **Yes** ☐ **No** (If yes please see section 3 on page 2)

If you would like your tax refund (if any) deposited directly into your bank, LEGIBLY provide below:

Account Type:	Bank Name	Bank Routing Number:	Your Account Number:
☐ Checking ☐Savings			

DEPENDENTS: (Use separate sheet if you need to add additional dependents)

Name (First, Initial, Last)	Relationship	Date of Birth	Social Security Number	Months Lived in Home in 2021 (0-12)

Please check all the boxes that apply to your 2023 tax year and provide all documentation

** **Important note:** If E-mailing your documents, please send all documentation in **ONE** email, not separate emails. This will help us accurately and efficiently complete your tax return. Send all completed forms (copies of IDs, W2s, all supporting documents, etc) in one email to CRMTaxServices@gmail.com

SECTION 1 INCOME (Check all that apply & include documents)	SECTION 2 EXPENSES AND DEDUCTIONS: (Check all that apply & include documents)	SECTION 3 HEALTH INSURANCE: (Check all that apply & include documents)
Employer (W-2) *How many W2s are you providing for your 2023 return (1, 2, 3, etc)? Taxpayer #_____ Spouse #______ **Independent Contractor** How many 1099-Misc or 1099-NEC are you providing for your 2023 return? Taxpayer #_____ Spouse #______ ***Self-Employment*** (See Section 5)	☐ Education Expenses ☐ Donate cash or goods to a charity? ☐ Pay Student Loan interest? (1098T) ☐ Pay Child/Dependent Care expense? ☐ Have a Mortgage Payment? (1098) ☐ Pay Property Taxes? *** For self-employed or 1099 Independent Contractor expenses see section 5**	Were you or any members of your household: ☐ Covered by a qualified employer, private or government health insurance plan? ☐ Enrolled in a health insurance plan through the federal or state marketplace? **If enrolled in Marketplace plan, provide 1095A form.**

SECTION 4 MISCELLANEOUS INCOME: (Check all that apply & include documents)	SECTION 5 *ADDITIONAL PAPERWORK: (Check all that apply & include documents)
☐ Interest (1099-Int) ☐ Social Security (SSA-1099) ☐ Retirement plan distribution (1099-R) ☐ Dividends (1099-Div) ☐ Rental Property* (See Section 6) ☐ Stock or Mutual Fund sale (1099-B) ☐ Cryptocurrency sale ☐ Unemployment (1099-G)	Please go to **www.CRMTaxServices.com** under the "Be Prepared" section to fill out these additional paperwork if you have: ☐**Self-Employment** *(Fill out and attach Itemized Business and Expense worksheet)* ☐ **Rental Income** *(Fill out and attach rental income worksheet)* ☐ If we did **NOT** previously prepare your return - please provide a copy of your 2021 tax return.

***Please use the space below for any questions you want addressed or to tell us of any changes in your life in 2023.** We want to find as many credits & deductions that we can. (For Example: Bought property, installed energy efficient windows, got married, had a child, etc.)

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NEW CLIENT CHECKLIST

Use the checklist below to aid you in getting all of the required documents we need to accurately file your income tax return

Please ensure all documents are complete and submit all paperwork together

Personal information – (All documents in the personal information section is required, if applicable)

- ☐ Completed Tax Questionnaire
- ☐ Signed and dated Client Service Agreement
- ☐ Copy of current ID for tax payer (and spouse if applicable)
- ☐ Copy of dependent's SS card(s) (if applicable)
- ☐ Copy of 2022 tax return. (If taxpayer and spouse filed separately, please include copies of both returns)

Information about income

- ☐ W-2 forms for you and your spouse
- ☐ 1099-MISC or 1099- NEC forms for you and your spouse (For any independent contractor work)
- ☐ CRM Tax Services Business Income and Expense form (For self-employment and independent contractor work)
- ☐ 1099-R Retirement plan distribution
- ☐ 1099-INT form(s), -DIV, -B, or K-1s for investment or interest income for stocks or cryptocurrency sales
- ☐ SSA-1099 (forms) for Social Security benefits received
- ☐ CRM Tax Services Rental property income and expenses form (For Rental Income)
- ☐ 1099-G form for Unemployment income
- ☐ Miscellaneous income: Jury duty, Gambling winnings, Medical Savings Account, Scholarships, etc.

Adjustments to income

- ☐ Form 1098-E for student loan interest paid (or loan statements for student loans)
- ☐ Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-high school)
- ☐ Form 1095-A for Health Insurance Marketplace plans
- ☐ Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- ☐ Records of Medical Savings Account (MSA) contributions
- ☐ Self-employed health insurance payment records

Deductions and credits (If itemizing deductions)

- ☐ Child care costs: provider's name, address, tax ID, and amount paid
- ☐ Mortgage interest, private mortgage insurance (PMI), and points you paid (1098 form from mortgage company)
- ☐ Real estate taxes (1098 form from mortgage company)
- ☐ Charitable donations: cash amounts, official charity receipts, canceled checks; value of donated property; miles driven and out-of-pocket expenses