

Blizzard Business Service, Inc

2023 Tax Preparation Questionnaire

Some of these questions may not apply to you. If you are unsure, please check the box "unsure". If I need further information I will contact you.

Name _____ Spouse _____
Occupation: Taxpayer _____ Spouse _____
Address _____
Phone (Cell) _____ Landline _____ E-mail _____
Direct Deposit (Enclose voided check **only if you changed from last year**) _____ Paper check _____
Are you married _____, divorced _____, widowed _____ Date of 2023 spouse death _____
Dependents you may claim for 2023 _____
New child? _____ Name _____ Date of birth _____ Child's Social Security # _____
Did you have a Stillborn in 2023 Yes _____ No _____
Is any dependent a full-time student (to age 24) Yes _____ No _____ Name _____
If you have been a victim of identity theft attach letter showing IRS IP Pin.
Is anyone (taxpayer, spouse, dependent) totally and permanently disabled _____ or blind _____
If you are able, copy the taxpayer and spouse (if married) driver's license OR provide date of issue and expiration. Taxpayer Issued _____ Expiration _____
Spouse Issued _____ Expiration _____

Yes ___ No ___ Unsure ___ 1) At any time during 2023 did you have a financial interest in or signature authority over a financial account or trust located in a foreign country?

Yes ___ No ___ Unsure ___ 2) Did you receive, send, sell or exchange or otherwise acquire any interest in any virtual currency (ie: crypto currency, bitcoin)?

Yes ___ No ___ Unsure ___ 3) Did you make purchases that you did not pay Michigan Sales Tax on?

Yes ___ No ___ Unsure ___ 4) Did you gift more than \$17,000 to any one individual during 2023?

Yes ___ No ___ Unsure ___ 5) Enclose W-2 forms

Yes ___ No ___ Unsure ___ 6) If you worked from home this year, indicate the number of days you worked from home versus total days worked if your job is normally in a city that collects income tax.

Yes ___ No ___ Unsure ___ 7) Education expense. Enclose Form 1098-T and other allowable expenses.

Yes ___ No ___ Unsure ___ 8) Interest/Dividend income. Enclose Forms 1099-INT, 1099-DIV, etc.

Yes ___ No ___ Unsure ___ 9) Sale of stocks or real estate. Enclose Forms 1099-B or 1099-S.

Yes ___ No ___ Unsure ___ 10) Unemployment benefits. Enclose Form 1099-G

Yes ___ No ___ Unsure ___ 11) Pension distributions. Enclose Form 1099-R.

Yes ___ No ___ Unsure ___ 12) Did you take an early distribution due to COVID-19?

Yes ___ No ___ Unsure ___ 13) Social Security benefits. Enclose Form SA-1099

Yes ___ No ___ Unsure ___ 14) Information for self-employed business

Yes ___ No ___ Unsure ___ 15) Information on rental property

Yes ___ No ___ Unsure ___ 16) Other income (gambling, lottery, jury duty, etc)

Yes ___ No ___ Unsure ___ 17) Did you make a non-payroll deducted contribution to a retirement account for 2023? [] IRA [] Roth IRA [] 401k [] Other Amount \$ _____ for _____

Yes ___ No ___ Unsure ___ 18) Do you have an HSA or FSA? Enclose form 5498-SA, 1099-SA and 12-31 bank statement for account if available.

Yes ___ No ___ Unsure ___ 19) Did you have a high deductible plan for family ___ self only ___ for 12 months OR how many months if not a full year _____

Yes ___ No ___ Unsure ___ 20) Did you have any debt from a mortgage, loan or credit card cancelled or forgiven by the lender. Enclose Form 1099-C or 1099-A and complete insolvency worksheet from my website.

Yes ___ No ___ Unsure ___ 21) Have you had an Earned Income Credit disallowed in a previous year?

Yes ___ No ___ Unsure ___ 22) Did you pay any student loan interest. Enclose Form 1098-E.

Yes ___ No ___ Unsure ___ 23) Did you buy or sell a home in 2023? Will need the closing statement that shows the sales price and all deductions allocated at the time of sale.

Yes ___ No ___ Unsure ___ 24) For child care expense provide caregiver, address, SS or EIN and amount paid. Also indicate for which child/children.

Yes ___ No ___ Unsure ___ 25) Did you pay estimated payments? List amounts and dates (include January 2024 payment)

IRS _____
MI _____

Yes ___ No ___ Unsure ___ 26) Health insurance. Enclose 1095-A, 1095-B or 1095-C. Amount you paid for health insurance \$ _____

Yes ___ No ___ Unsure ___ 27) Enclose copy of 2023 winter and summer property taxes (even if not paid)

Yes ___ No ___ Unsure ___ 28) Energy Credits: "Energy Star" rated solar, windows, doors, furnace, air conditioning, insulation; primary or second residence. Enclose copy of bill(s).

Yes ___ No ___ Unsure ___ 29) Do you exercise controlling interest of 25% or more in any corporation LLC or LLP

Additional information:

Please Enclose another sheet of paper if you have more information to add to these questions.

X _____
Taxpayer Signature

X _____
Spouse Signature (if married)

Dated _____
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