

Adams, Moore, and Adams, LLC. Individual Income Tax Questionnaire

Please provide the following information to ensure your return is prepared correctly and avoid costly penalties, interest, and amending of returns. If you are a new client, please provide a copy of last year's tax return including depreciation schedules. Thank you for helping us prepare a correct return.

Taxpayer: _____

Spouse: _____

Address: _____

Phone: _____ Email: _____

Today's date: _____

New Clients	
DOB _____	SSN _____
DOB _____	SSN _____

Please carefully read the following and check all that apply to your return. Supply additional information on back. **If you have new dependents please provide names, birthdates, and SSNs.**

Tax information

- | | | |
|--|-----------------------------------|-------------------------------------|
| Marital status change | Change in dependents | Dependent who doesn't live with you |
| Traditional IRA contributions | Roth IRA contributions | HSA contributions (5498-SA) |
| HSA withdrawals(1099-SA) | College tuition (provide 1098T) | Moved during the year |
| Self-employment income | For-profit farm | Rental property income/loss |
| Social Security benefits | Retirement/IRA income | Inherited property |
| Bought/sold rental property | Bought/sold business property | Paid estimates (not withholding) |
| Had online gambling account | Had foreign bank acct | Owned cryptocurrency |
| Bought/sold real estate | Paid for dependent care | Bought electric car |
| Have corporation or LLC | Healthcare.gov Insurance (1095-A) | Energy efficient home improvements |
| Had qualified overtime | Had qualified tips | Had vehicle loan interest |
| Fuel credit (please provide make, model, and description of equipment that used the most fuel) | | |

Tax preparation preferences

- | | | |
|----------------------|----------------------------|-------------------------|
| Bank account changed | Direct deposit any refunds | Direct pay amounts due |
| Mail my return | I'll pick up my return | Send my copy via portal |

Due to IRS changes federal returns with a refund that do not provide direct deposit information will result in an IRS notice CP53E requesting bank account information. Failure to respond within 30 days will result in the issuance of a paper check 6 weeks later. To prevent at least 10 weeks delay of your refund we strongly suggest direct depositing your refund.

Please provide a copy of taxpayer and spouse driver's licenses so we may e-file your Ohio return!

I certify that the information provided above is true to the best of my knowledge.

Signed _____ Date _____

Additional Information and Questions