



TAXES MADE SIMPLE, INC.

Date dropped off: _____

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

Client Name: _____ Tax Year: 2023

- ** Do you want your return expedited? Fee of \$45 is added to tax preparation. Yes / No Initial: _____
 - ** For this year's tax return, would you like a copy as a PDF or on CD (Cost of \$10)? Yes / No Initial: _____
 - ** Do you need to have the Tax Preparation Fee deducted from your Federal Refund? Yes / No Initial: _____
- If Yes, Bank Processing fees are \$64.90 added to the tax preparation fees. Signature: _____

- | | |
|---|---|
| | Yes/Unsure/No |
| *Would you like to have your Refund direct deposited? (confirm account information)(no fee)..... | <input type="radio"/> <input type="radio"/> <input type="radio"/> |
| *If you have a Balance Due , can we withdrawal a balance due automatically from a bank account? | <input type="radio"/> <input type="radio"/> <input type="radio"/> |
| Date of Withdrawal? _____ Initial: _____ (no fee for withdrawal) | |

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? _____
- 3- Can you be **claimed** as a dependent by another taxpayer? (ie. Can parents claim you?).....
- 4- Are you or your spouse **disabled and/or blind**?.....
- 5- Do you want to allocate \$3 of your tax to the Presidential Election Campaign Fund?.....
- 6 -Are you or your spouse in the military/veteran? Active Duty / Reserves / Guard / Retired

Dependent Information

- 7- Were there any **changes in dependents** from the prior year? (New child/ claiming parent).....
- 8- Do you have any children under age 18 with Interest, Dividends, Capital Gains?
- 9- If you alternate your dependent(s), who do you claim this tax year? _____
- 10- Did you maintain a home for someone not claimed as a dependent? (ie. Parent).....
- 11-Did you **contribute to an Ohio 529 College Plan?** If yes, Provide Year End Statement.....

Healthcare Information

- 12-Did you pay **Health Insurance Premiums** directly for yourself/family: \$ _____
- 13-Did you **receive a Healthcare Premium Assistance or "Marketplace" Assistance?** Form 1095-A
- 14-Do you have a **Health Savings Account (HSA)?** If yes, Provide Form 1099-SA.....

Income Information (Investments - Stocks - Foreign Accounts)

- 15-Do you have any **stock investments/brokerage account/investment accounts?**
- 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.....
- 17-Do you have a stock option? Was there any exercised this year?
- If yes, bring brokerage tax form 1099s and original cost and date.
- 18-Did you have any **Foreign Income** or **pay any Foreign Taxes?**.....
- 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.....
- 20-Do you have any Foreign Bank Accounts, Retirement Accounts, Property?.....
- 21-Did you **cash in any U.S. Savings bonds?** If yes, provide Form 1099-INT from bank.....

Other Income (Retirement - Alimony - Unemployment - Business & Other)

- 22-Did you make any **Rollovers or Withdrawals from any Retirement Account?**.....
- 23-If you **reached Age 73**, did you withdraw your **Required Minimum Distribution (RMD)?**.....
- 24-If you **took your Required Minimum Distribution (RMD)**, did you participate in the Qualified Charitable Distribution (QCD)? If so, need statement of organization & amount.....
- 25-Did you receive **Social Security Benefits** such as Retirement, Death, or Disability?.....
- 26-Did you **Receive or Pay Alimony** (not child support)? If yes, provide activity for year.....
- 27-Did you receive any **Unemployment or Disability Income?** If yes, provide 1099 Tax Form.....
- 28-Did you **start or dispose of a business** during the year? **Receive any Form 1099-NEC/MISC?**...

