# 2023 Mail, Drop off and Appointment Questionnaire

NAME:		_ SIGNATURE		
Day or Cell Ph#				
Best Time To Call:		Email:	(Signature to Authorize e-file)	
☐ Same Address ☐ Change of Addr	ess			
Filing Status Single Married Filing	Joint  Married	d Filing Separate ☐ Head of Ho	ousehold	
Health Insurance Did you purchase h	ealth care through	gh Covered California anytim	ne in 2023? ☐ Yes ☐ No	
Did you and family have medical insurance	_			
Direct Deposit Information				
•			Chaolsina	
		Acct. #	———— ☐ Checking ☐ Savings	
		arge) + Plus Prep Fee subtr		
	pid (Print Checl	k) $\square$ Rapid (M	ail Check)	
<b>Dependent Changes:</b> Adding Dep	1 \	Removing Dependent		
First Name Last Nam			Dalatianalia	
riist Name Last Nam	е ров	Social Security #	Relationship	
Child Care Information: □ N	 one			
Provider				
Phone #				
Amount Paid \$ Dependent(s) _		SS# or Fed II	D#	
Income - 1099's to include		Misc. Deductions		
		IRA - Traditional	\$	
		Roth	\$	
• • • • • • • • • • • • • • • • • • • •		Alimony Paid	\$	
		Student Loan Int	\$	
		Energy Credits/Solar = Explain \$		
		Educational Expense (1098-T)		
		Tuition	\$	
		Books/Supplies	\$	
Sale of Stock - (Need 1099-B)		Student's Name(s)		
Retirement Distributions - (Need 1099-R's)		School Name		
		School Address		
Notes:				

## **Deductions if Itemizing (Long Form Only)**

#### Medical

Prescriptions	\$
Doctors	\$
Dentist	\$
Medical Supplies	\$
Health Care Insurance	\$
Long Term Care Insurance	\$
Number of Medical Miles Traveled	\$
Other	\$

## **Taxes Paid**

Real Estate Taxes	\$
Sales Tax on Car, RV, Boat	\$
DMV Registration	\$
	\$

#### **Interest Paid**

Mortgage Interest	\$
	\$
	\$
Points Paid	\$
Investment Interest	\$

## **Contributions** (same as 2022)

Cash	\$	
Non Cash	\$	
Non Cash Over \$500 must include Name of Organization		
(List depreciated value of items	s) \$	

## Business Mileage (California Only)

Total Miles Yearly	
Business Miles Yearly	
Parking & Tolls	\$
Year/Make/Model	

## **Unreimbursed Employee Expenses**

(Still allowed on California State Return ONLY)

Uniforms/Shoes/Cleaning	\$
Work Tools	\$
Telephone/Internet Services	\$
Computer & Supplies	\$
Professional Subscriptions	\$
Training/Seminars	\$
Meals/Entertainment	\$
Travel	\$
Union Dues	\$
Safe Deposit Box	\$
Tax Preparation Fee	\$
Other	\$

#### **Notes**

Rentals and Businesses need breakdown of Income and Expenses
