

MARCH 15, 2024--Deadline to submit information before an extension may be required

To be sure that we have the most up-to-date contact information, please complete the following items:

Name: _____

Address: _____

Check the box if this is a new address Date of move _____

County of Residence as of 1/1/23: Taxpayer _____
 (Example: Hendricks) Spouse _____

Preferred Phone Number(s): Taxpayer _____ Type _____
 Spouse _____ Type _____

Email Address(es): Taxpayer _____
 Spouse _____

Tax Return Delivery

 Carefully review these options to choose the one that works best for you.

Option #1--PAPERLESS using SafeSend Returns:

- A secure link to your tax return, e-file forms, vouchers and any other documents will be sent to you electronically via email. For security, you will be sent an access code and have to answer knowledge-based authentication questions to access your return.
- After accessing your return, you can review it and even download it to your computer.
- You can electronically sign the E-File authorization forms using the IRS compliant E-Signature feature which will return them to us and send us a notification that they have been signed.
- Vouchers can be downloaded, printed and mailed in with payment or a link is provided to pay electronically. There is also a payment reminder system that will send reminder emails throughout the year when payments are due.

Your supporting documents (such as W-2s, 1099's, etc) will be scanned into our records then shredded. If you need/want your originals, please make copies of your documents to submit to us.

Option #2--PAPER:

- Your tax return, e-file forms, vouchers and any other documents will be printed out on paper.
- You will pick up your return and supporting documents when the return is complete.
- The e-file forms can be signed in our office when you pick up your return, or you can take them with you and return them, signed, at a later time.

The option I/we choose is:

Option #1-PAPERLESS

Initial this box if you've made copies of your documents or kept the originals in your possession.

Option #2-PAPER

Preparer Permissions

Yes No

1 If necessary, do you want the IRS and/or the Indiana Department of Revenue (or other applicable state agency) to be able to discuss the returns with the preparer?

Refund Information

Choose One 2 If you have an overpayment of 2023 taxes, do you want the excess:
 A) Refunded?
 B) Applied to your 2024 estimated taxes?

Yes No

3 If you are to receive a refund, do you want it deposited directly into your bank account?
 If yes, where would you like it deposited?

Same account as last year
 New account, please provide a voided check or the following bank information:

Yes No N/A

Bank Name _____ Type of Account _____
 Bank Routing Number _____ Your Account Number _____

If married, is this a joint account?

Information Requests/Verification

Yes No

4 I/We agree to provide Rader & Rader CPAs with all necessary documentation and to respond to requests for information in a timely manner. I/We understand that information not provided in a timely manner may result in late filing and penalties.

5 I/We have submitted this information for the sole purpose of preparing my/our tax return(s). Each item can be substantiated by receipts, canceled checks, or other documents. This information is true, correct, and complete to the best of my/our knowledge.

Estimated Tax Payments

Check this box if you did not make any estimated tax payments for 2023.

	Federal - IRS		State - IDR	
	Date Paid	Amount Paid	Date Paid	Amount Paid
2023 1st Quarter (due 4-18-23)				
2023 2nd Quarter (due 6-15-23)				
2023 3rd Quarter (due 9-15-23)				
2023 4th Quarter (due 1-16-24)				

Yes No

6 Do you expect any significant changes to 2024's income or tax withholding (ie. sale of business, job loss, large pay raise) that would require a change to your estimated tax payments for next year?

If so, please explain: _____

Personal Information

Yes No

7 Did your marital status change during the year?

8 Did you pay any rent in 2023 for your personal residence?

Address of Property Rented _____

Landlord's Name & Addr _____

No. of months rented _____ Total Amount of Rent Paid in 2023 \$ _____

9 Did your occupation change during the year?

If yes, what was your occupation in 2023? Taxpayer _____ Spouse _____

10 Could you be claimed as a dependent for 2023 on another person's tax return?

Dependent Information

Yes No N/A

11 Do you have any dependents? **If NO, skip to question 20.**

In order to claim the Child Tax Credit, you must provide a document dated in 2023 showing the address of your dependent(s) under the age of 18. Acceptable documents include: medical bills, school records, childcare records, healthcare provider statement, etc.

We are required to collect this information every year for each dependent you claim.

12 Included with my/our documentation is a document from the above list for each dependent under the age of 18.

13 Were there any changes in dependents from the previous year?
Please note any changes (including full name, d/o/b & SS # for any additions)

14 Do you have any children over the age of 18 that you support who were unmarried at the end of 2023?
If you answered yes:

Yes No

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Are they a full-time student?
Did they earn less than \$4,700 in 2023?

15 Did you have any children under age 19 (or under 24 if a full-time student) at the end of 2023 with total investment income in excess of \$1,250?

16 Did you pay for the care of one or more dependents to enable you to work, look for work, or while a full-time student?

If so, please include the following on to whom it was paid:

Name & Address	Fed ID/Soc Sec #	Amt Paid	Dependent's Name
_____	_____	\$ _____	_____
_____	_____	\$ _____	_____

17 If divorced, are there any agreements in place dictating when each spouse can claim a child?
If you are claiming a child who did not live with you over half the year, you must provide a signed copy of Form 8332.

18 Was a dependent child of yours enrolled in an accredited private school (K-12) or home school in '23?
NOTE: E-learning/Virtual learning for public school students does not qualify.

Number of dependents attending private or home school _____

Name of private school (or enter home school) _____

19 Are any of your dependents adopted? Indiana has expended the exemption amount for adopted dependents regardless of the year they were adopted. Please the names of your adopted children.

Purchases, Sales & Debt (Please include appropriate documentation)

Yes No

20 In 2023, did you start a business, purchase rental or royalty property, or acquire an interest in a partnership or S corporation?

21 Did you sell stocks, bonds or other investment property in 2023? (not in a retirement plan)

22 Did you exercise any stock options during the year or were you granted any?

23 Did you have any investments that became completely worthless in 2023 (not in a retirement plan) or any money you loaned to someone that became totally uncollectible in 2023?

24 Did you sell any securities at a loss and buy identical securities within 30 days before or after?

25 Did you foreclose on or abandon any property in 2023 or have any debts cancelled or forgiven?
If yes, please include your 1099-C.

Purchases, Sales & Debt (Cont'd)

Yes No

26 Did you purchase, sell, or refinance your principal home or second home, or did you take out a home equity loan? **(If yes, please provide a copy of your closing papers.)**

27 Did you make any out-of-state purchases (by telephone, internet, mail, etc) that the seller did not collect sales tax? If yes, provide amount of purchases: _____

28 Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle in 2023?

29 Did you make any residential energy-efficient improvements or purchases? If yes, please provide documentation.

Retirement Plans (Please be sure to include all 1099's)

Yes No

30 Did you receive any distributions from a retirement plan: 401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.? If yes, please include your 1099's (1099-R, SSA-1099, etc).

31 Will you or your spouse be at least 73 in 2024? If yes, you will need to take out your required minimum distribution.

32 Did you "roll over" a profit-sharing, IRA, or retirement plan distribution into another plan in 2023? If yes, please include any 1099's you received.

33 Did you make a contribution to a retirement plan NOT through your employer in 2023?

34 Did you convert part or all of your traditional, SEP, or SIMPLE IRA into a Roth IRA in 2023? If yes, please include any 1099's you received.

35 Are you interested in making additional contributions to a retirement plan (IRA, etc.) for 2023?

36 Did you inherit an IRA or a retirement account during 2023?

Education Deductions

Yes No N/A

37 Did you make any contributions for 2023 into Indiana's 529 Plan (College Choice)? If so, complete the chart below or provide your year-end statement(s).

Account Number	Amount Contributed

37b If you have not made contributions for 2023, are you interested in doing so?

38 Did you receive a distribution from an Education Savings Account or a 529 Plan?

If yes, please include all 1099-Q's you received.

If the distribution was for someone who is not being claimed as your dependent, what was the amount of educational expenses paid? **\$**

39 Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

If yes, you must include the following items:

- A) 1098-T for each college/university/vocational school
- B) Billing statements for each college/university/vocational school
- C) Amounts paid for books and other necessary supplies

40 If you answered yes to #39, was the student convicted, before the end of 2023, of a felony for possession or distribution of a controlled substance?

41 If you are eligible for and planning to claim a deduction or credit for your child's education expenses, have you made sure your student is not claiming a deduction or credit for the same expenses?

42 Did you pay any student loan interest for which you were legally obligated to pay? If yes, please include any 1098-E's you received.

43 Did you make any charitable contributions to a College or University located in Indiana?

College/Univ _____ Date Given _____ Amount \$ _____
 College/Univ _____ Date Given _____ Amount \$ _____

Health Care

Yes No

44 Did you buy health insurance from the exchange? We must report and reconcile the premium assistance credit on your tax return. If so, please include the Form 1095-A or 1099-H that you received.

45 Did you or your spouse have a Health Savings Account (HSA) or Medical Savings Account (MSA) in 2023? Note - these are different than a Flexible Spending Account.

If yes, please provide Forms 1099-SA and/or 5498-SA **and** complete the following:

HSA/MSA Plan Type: family or individual plan?	
Was your plan in effect for the entire year?	
If no, which months was it in effect?	
What were your total medical expenses for 2023? (include what you took withdrawals for)	\$
How much did you contribute for 2023?	\$

Miscellaneous (Please include all 1099's, W-2G's, etc.)

Yes No N/A

46 Did you receive any Social Security Income in 2023?

47 Did you receive any Disability Benefits in 2023?

48 Did you receive any Unemployment Income in 2023?

49 Did you receive any awards, prizes, hobby income, gambling or lottery winnings?

50 Did you or any of your dependents receive an Identity Protection PIN from the Internal Revenue Service or have you been a victim of identity theft? If yes, please provide the information.

51 At any time during '23, did you (a) receive (as a reward, award, or payment for property or services, including mining); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? If so, please provide us with the details of the transactions.

52 Were you notified by the IRS or other taxing authority of any changes in prior year returns that you have not already notified Rader & Rader about?

53 Did you receive a 1099-K for online sales? (Examples: Facebook Marketplace, Ebay, etc.)

54 Did you use any part of your home exclusively for a business you own? (N/A if your business is a corporation)

55 Did you pay any individual (not a business) \$2,600 or more to perform household services in 2023?

56 In order for charitable donations to be deductible, you must have receipts for all cash donations or for checks of \$250 or more. Do you have the required receipts?

57 Did you gift more than \$17,000 to any individual during 2023?

58 Did you or your spouse own any financial assets located in a foreign country? (This does not include foreign stocks held in a US brokerage account.)

59 Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

60 Did you get a distribution from, or were you a grantor of or transferor to, a foreign trust?

Taxpayer Signature and Date

Spouse Signature and Date