

******* Important 2023 Additional Tax Questions *******

Please read the questions/statements below and check the appropriate answers/requests.

Client Name: _____

- Yes ___ No ___ Would you like Alesa D. Downing, CPA PLLC to **electronically file your 2023 tax return?** (If no, you must sign a form that states you declined to e-file.)
- Yes ___ No ___ Do you have **children under the age of 17 or kids in college?**
- Yes ___ No ___ Do you expect to take the **Earned Income Credit, Child Tax Credit, or American Opportunity Tax Credit?** If yes, please see additional questionnaire
- Yes ___ No ___ Do you expect to claim **Head of Household** filing status (HOH is Single with qualified dependents)? If yes, please see the additional questionnaire.
- Yes ___ No ___ Did you have any assets in a **foreign bank or foreign brokerage account during 2023?** The IRS has cautioned taxpayers with foreign accounts to properly report income from these accounts and file the appropriate forms on time to avoid stiff penalties. (FBAR)
- Yes ___ No ___ Did you make quarterly tax payments? How many? _____ Amounts? _____
- Yes ___ No ___ At any time during 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?
- Yes ___ No ___ Is your bank information the same?
- Yes ___ No ___ Do you currently have a financial advisor? If so, please provide his/her name if we have your permission to work with him/her with tax strategies. _____
- Yes ___ No ___ Are you interested in long-term tax planning?
- Yes ___ No ___ Are you interested in learning more about Tax Intelligent investing strategies through Avantax, our affiliated broker-dealer?

CLIENT SIGNATURE _____

Please complete this document and E-mail, fax, upload it to your portal in Canopy.

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