

# GENERAL INFORMATION

Office Use Only:

CLIENT # \_\_\_\_\_ PARTNER'S NAME \_\_\_\_\_

NAME: \_\_\_\_\_  
(last) (first) (middle)

SPOUSE'S  
NAME: \_\_\_\_\_  
(last) (first) (middle)

RESIDENTIAL  
ADDRESS: \_\_\_\_\_ APT# \_\_\_\_\_

CITY &  
STATE: \_\_\_\_\_ ZIP \_\_\_\_\_

HOME PHONE#: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

## TAXPAYER

## SPOUSE

OFFICE  
PHONE#: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

OFFICE  
PHONE#: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

S.S. # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

S.S. # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

BIRTHDATE: \_\_\_\_\_ BIRTHDATE: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_ OCCUPATION: \_\_\_\_\_

<u>DEPENDENT'S NAME</u>	<u>DATE OF BIRTH</u>	<u>S.S. #</u>	<u>RELATIONSHIP</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____

HOW WERE YOU REFERRED TO OUR COMPANY? \_\_\_\_\_

**PLEASE MARK ONLY THE FOLLOWING QUESTIONS THAT APPLY TO YOU.  
CHANGES TO TAX LAWS ARE IN BOLD.**

**SOURCES OF INCOME:**

- A. Do you have all W-2's from places you were employed? \_\_\_\_\_
  - 1. Unemployment Compensation? Sick Pay? \_\_\_\_\_
  - 2. Military Combat Pay? \_\_\_\_\_
  
- B. Do you have a statement for each account in which you have received interest? \_\_\_\_\_
  - 1. Did you cash in U.S. Savings Bonds? What was it used for? \_\_\_\_\_
  - 2. Interest received from insurance policies? \_\_\_\_\_
  - 3. Do you receive any tax-free interest income? \_\_\_\_\_
  
- C. Do you have a statement for each account in which you have received dividends? \_\_\_\_\_
  
- D. Retired? Bring all 1099's from pension and social security benefits. \_\_\_\_\_
  
- E. Sale of stock? Bring your records of both purchase and sale. Twelve-month holding period for long term gains. **Cost basis reporting, please provide full documentation.** \_\_\_\_\_
  
- F. Have you taken a distribution from any retirement account? **Turning 73 in 2024?** Ask about minimum IRA distributions. Educational and First Home Buying cost are excludable. \_\_\_\_\_
  
- G. Income from miscellaneous source. \_\_\_\_\_
  - 1. Alimony? \_\_\_\_\_
  - 2. Commissions? \_\_\_\_\_
  - 3. Lump sum distribution from pension/profit sharing/savings and investment plan? \_\_\_\_\_
  - 4. Did you receive any other monies? \_\_\_\_\_
  
- H. Have you had any debt cancelled? \_\_\_\_\_
  
- I. Rollover IRA to Roth IRA? \_\_\_\_\_
  
- J. Did you review your statement of earnings from Social Security? \_\_\_\_\_  
You can go online and review.
  
- K. Did you use or transact using any cyber currency (bitcoin)? \_\_\_\_\_
  
- L. Did you receive money from cash apps 1099K? \_\_\_\_\_

**ADJUSTMENTS TO INCOME:**

A. Are you divorced? Do you make alimony or separation payment?  
Bring divorce papers with you. Recipient's last name and social security number. \_\_\_\_\_

Name \_\_\_\_\_ S.S. # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

B. Cashed in a certificate of deposit early? \_\_\_\_\_

C. Are you or your spouse covered by a retirement plan at work?  
If so, what kind? \_\_\_\_\_

D. Individual retirement account? **Limits-\$6,500 under 50 and \$7,500 over 50 (IRA)\*** Deposit must be made by **April 15, 2024.** \_\_\_\_\_

If so, how much went into each account:

Husband \_\_\_\_\_

Wife \_\_\_\_\_

E. If you are unable to deduct your IRA contribution, would you still like to contribute to a Roth IRA? \_\_\_\_\_

F. Did you or your employer establish a Health Savings Account?  
Please provide statements \_\_\_\_\_

G. Educational IRA for your children. \_\_\_\_\_

H. Education Expenses Deduction (form 1098-T) \_\_\_\_\_

I. Deduction for Army Reserve, Performing Artist and Legal Fee's for discrimination lawsuits. \_\_\_\_\_

J. Moving Expenses? Applies to Military Only!!!! \_\_\_\_\_

**DEDUCTIONS FROM INCOME:**

A. Did you have any medical expenses? Were you reimbursed for the expenses?  
Long term care expenses? long term care insurance? home improvements for medical reasons? **Medical Mileage is 22 cents in 2023. 65 or older? Have you registered for Medicare? Insurance from exchange 1095A?** \_\_\_\_\_

B. Make any estimated tax payments and/or prior year tax payments to the Federal, State or City governments? Bring cancelled checks. \_\_\_\_\_

C. Any interest expense? \_\_\_\_\_

1. In the event you have not received a statement, call and get information, and ask for a statement to be mailed! \_\_\_\_\_

- 2. Student Loan Interest, loans could be in student's name to avoid income limitations. \_\_\_\_\_
- 3. Interest related to investments (Margin interest). \_\_\_\_\_

D. Any charitable contributions?

- 1. **All contributions must be documented.**
- 2. Cash contributions? (List of who & amount) \_\_\_\_\_
- 3. Non-cash contributions? (Need valuation receipt, inventory, pictures). \_\_\_\_\_
- 4. Did you incur any charitable travel expenses? Volunteer expenses? Charitable mileage rate is 14 cents in 2023. \_\_\_\_\_
- 5. State political contribution. \_\_\_\_\_
- 6. **Consider donating appreciated stock.** \_\_\_\_\_
- 7. **IRA RMD?** \_\_\_\_\_
- 8. **New Ohio Angel scholarship credit?** \_\_\_\_\_

E. Did you have casualty must be a federally declared disaster. \_\_\_\_\_

F. Expenses related to your job. Only in limited circumstances \_\_\_\_\_

**OTHER INFORMATION:**

A. Did your marital status change during 2023? \_\_\_\_\_

B. Any new additions to the family? \_\_\_\_\_

- 1. Any dependents claimed in prior year which are not dependents this year? \_\_\_\_\_
- 2. Do you have a child in college or did you return to school? \_\_\_\_\_
- 3. Planning a college education? Ask about prepaid tuition plans, scholarships, 529's to help with tuition cost.
- 4. Do you provide support for anyone who you may be claimed as a dependent? Please go over **all** members of your household. Are you being claimed as a dependent by another person? \_\_\_\_\_

C. Are you 65 or over? \_\_\_\_\_

- 1. Are you disabled or blind? \_\_\_\_\_
- 2. If 65 or over, or disabled, you may qualify for Homestead Exemption or reduced utility bills. \_\_\_\_\_

D. Did you sell, buy or finance a home in the last three years? \_\_\_\_\_

- 1. Bring all related escrow settlement statements and improvements. \_\_\_\_\_

E. Do you have income from partnership or any other business venture? (Whether profitable or not) Bring K-1's or let us know if they are coming. \_\_\_\_\_

F. Self employed? Own your own business? \_\_\_\_\_

- 1. Cancelled check and bank statements for December 2022 to January 2024. Both personal and business must be presented! (All 14 months) \_\_\_\_\_
- 2. Sell a car/truck or business equipment? If so, names, dates, cost, sales price and all paperwork. \_\_\_\_\_
- 3. To be able to deduct auto expenses, you must maintain a log book on a daily basis. \_\_\_\_\_

- 4. Did you buy any business property in 2023? \_\_\_\_\_
- 5. Do you have a Keogh Account or SEP? Do you need one? \_\_\_\_\_
- 6. Do you have an office in your home? Need sq. ft. \_\_\_\_\_
- 7. Did you pay for health insurance premiums for yourself, your spouse and your dependents? Employee Health Care Credit \_\_\_\_\_
- 8. Were you eligible to participate in any subsidized health plan maintained by your spouse's employer? \_\_\_\_\_
- 9. Did you go on vacation? If so, was it connected with your business or profession in any way? \_\_\_\_\_

**G. The Residential Energy Credit is annual not lifetime starting in 2023  
Furnace, Windows or Exterior Doors?** \_\_\_\_\_

H. Have you received tax notices from any of the tax agencies during 2023?  
If so, let us review them. \_\_\_\_\_

I. Do you own rental property? (Bring all related paperwork) \_\_\_\_\_

J. Have you been audited in the last three years? \_\_\_\_\_

K. Do you have copies of your prior returns? (2020-2022) \_\_\_\_\_

L. Do your children have savings accounts or any other type of interest-bearing investments? If so, bring in their 1099 statement and expenses paid to maintain these accounts. \_\_\_\_\_

M. Do your children have any earned income? If so, bring in their W-2's or 1099 statements. Did you open their Roth IRA? \_\_\_\_\_

N. Did you incur child care expenses so you and your spouse could work?  
If so, bring in cancelled checks and list the following information for who you paid: \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

S.S.# or \_\_\_\_\_

I.D.# \_\_\_\_\_

**\*Note: Without the above information, the credit will not be allowed.**

O. Did your employer provide dependent care benefits? (DCB)? \_\_\_\_\_

P. Adoption Expenses? \_\_\_\_\_

Q. Do you employ anyone in your home? \_\_\_\_\_

**ANYTHING ELSE YOU FEEL IS A DEDUCTION?**

If so, please bring receipts and documentation. \_\_\_\_\_

**\*REMINDER: ALL DEDUCTIONS MUST BE SUBSTANTIATED WITH RECEIPTS AND/OR OTHER DOCUMENTATION.**

**\*\*INCOME TAX FEES MUST BE PAID BEFORE COMPLETED RETURNS WILL BE RELEASED. WE WILL INFORM YOU OF THE TAX PREPARATION FEE BEFORE YOU COME IN TO PICK UP YOUR RETURNS.**

**Please consult with your tax advisor regarding how these matters can impact you.**

- 1. Mileage rate for 2024 is 67 cents per mile.**
- 2. IRA contributions increase to \$7,000 in 2024.**
- 3. Foreign Asset and Entity reporting rules 2024. Ask!!!**
- 4. New 401k limit \$23,000.00, \$30,500.00 if over 50.**

**It is more important than ever to consider a tax planning appointment during the year (May – December). We at Culkar, Stachowicz & Co. want to provide the best service possible. To successfully do that, planning during the year is essential.**

**Thank you for your trust.**

**Culkar, Stachowicz & Co. CPA's**