



Vision Tax Planning 2023 NEW CLIENT TAX QUESTIONNAIRE

(Please Print)

TAXPAYER INFORMATION											
Taxpayer Last Name:		First:	Middle:	Suffix:	<input type="checkbox"/> Mr.	<input type="checkbox"/> Miss	Marital Status:				
					<input type="checkbox"/> Mrs.	<input type="checkbox"/> Ms.	Single <input type="checkbox"/> Married <input type="checkbox"/> Div <input type="checkbox"/> Sep <input type="checkbox"/> Widow <input type="checkbox"/>				
Social Security Number:		Date of Birth:	Age:	Occupation:		Home Phone:		Cell Phone:			
Email Address:					Preferred Method of Contact:						
					Home Phone <input type="checkbox"/>		Cell Phone <input type="checkbox"/>		Email <input type="checkbox"/>	Text <input type="checkbox"/>	
Street Address:						Apt. #:					
City:		State:			Zip Code:						
Did your marital Status change during the year?					<input type="checkbox"/> Y	<input type="checkbox"/> N	Did your address change during the year?			<input type="checkbox"/> Y	<input type="checkbox"/> N

SPOUSE INFORMATION									
Spouse Last Name:		First:	Middle:	Suffix:	<input type="checkbox"/> Mr.	<input type="checkbox"/> Miss			
					<input type="checkbox"/> Mrs.	<input type="checkbox"/> Ms.			
Social Security Number:		Date of Birth:	Age:	Occupation:		Cell Phone:			

DEPENDENTS (CHILDREN AND OTHERS)									
Name (Last, First)	Relationship	Date of Birth mm/dd/yyyy	Social Security Number	Months Lived with You	Full-Time Student		Did You Provide More Than Half of the Support?		
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N	
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N	
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N	
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N	
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N	
					<input type="checkbox"/> Y	<input type="checkbox"/> N	<input type="checkbox"/> Y	<input type="checkbox"/> N	

• Do you provide a home for or help support anyone else, not listed above?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Were there any births, deaths, marriages, divorces or adoptions in your immediate family in 2023 or 2024? <i>(If yes, list details in "Other Information" Section on page 3)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Could you be claimed as a dependent on another person's tax return for 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• If requested by the IRS, do you have documentation (i.e. receipts, records) to substantiate your eligibility for the Child Tax Credit, Earned Income Tax Credit and/or Head of Household Filing Status?	<input type="checkbox"/> Y	<input type="checkbox"/> N

INCOME INFORMATION		
• Did you receive any income from employment as an employee or independent contractor? <i>(If yes, attach Form W-2 and/or 1099-NEC)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive any Unemployment Compensation in 2023? <i>(If yes, attach 1099-G)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive any Social Security benefits during 2023? <i>(If yes, attach Form SSA-1099)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you sell any Stocks/Investments in 2023? <i>(If yes, attach 1099-B)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive Interest Income from a savings account or dividends from mutual funds/investments? • <i>(If yes, attach Form 1099-INT and/or 1099-DIV)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you have any gambling winnings or losses, including lottery, bingo and raffles? <i>(If yes, attach W2-G)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive, sell, exchange or dispose any virtual currency?	<input type="checkbox"/> Y	<input type="checkbox"/> N

RETIREMENT INFORMATION

• Did you or your spouse receive payments/distributions from a retirement plan such as a pension, 401K, IRA) in 2023 or plan to in 2024? <i>(If yes, attach Form 1099-R)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive a distribution from a retirement plan in order to pay medical bills, for higher education expenses or to purchase a home in 2023? <i>(If yes, list reason: _____)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you make any contributions to a retirement plan such as a pension, 401K, IRA, SEP, SIMPLE in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you convert an IRA to a Roth IRA or perform a Backdoor Roth IRA in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N

HEALTH INFORMATION

• Did you purchase health insurance from the Healthcare.gov Marketplace in 2023? <i>(If yes, attach Form 1095-A)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you or your spouse participate in a Health Savings Account (HSA) or other Medical Savings Account in 2023? <i>(If yes, attach Form 1099-SA and Form 5498-SA)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you/ spouse/dependent incur a substantial amount of unreimbursed medical expenses in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N

HEALTH INFORMATION

• Do you own a home? <i>(If yes, attach Form 1098 – Mortgage Interest and 2023 Property Tax Statement)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you rent during 2023? If yes and total household income is less than \$67,300, answer the following:	<input type="checkbox"/> Y	<input type="checkbox"/> N
a) Name and address of Landlord:		
b) Monthly rent paid in 2023:		
c) Number of months rented:		
d) Is Heat included in your rent payment?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you sell and/or purchase a home in 2023 or 2024? <i>(If yes, attach Closing Disclosure & 1099-S)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you receive rent from real estate or other property? <i>(If yes, attach support for income and expenses)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Was your principal home or rental property foreclosed on in 2023 or 2024? <i>(If yes, attach 1099A or 1099C)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you make any energy efficient improvements to your home in 2023? <i>(If yes, list amount \$ _____)</i>		

CHILD AND DEPENDENT CARE

• Did you receive dependent care benefits from your employer in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you pay any child/dependent care expenses in 2023 for a child under 13 years old or costs to care for a handicapped individual? If yes, complete the following: _____	<input type="checkbox"/> Y	<input type="checkbox"/> N
Name of Child Care Provider:	Provider EIN/Social Security Number:	
Provider Address:	Amount Paid to Provider	
	\$	

EDUCATION

• Did you, your spouse or a dependent incur any tuition, fees or book expenses that were required to attend college, university or vocational school in 2023? <i>(If yes, attach 1098-T and support for expenses)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you, your spouse or a dependent receive scholarships or grants for higher education in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you, your spouse or dependent receive a distribution from a 529 Plan or Education Savings Plan in 2023? <i>(If yes, attach Form 1099-Q.)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you make any contributions to a 529 Plan or Education Savings Plan in 2023? <i>(Attach support)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you pay any Student Loan Interest in 2023? <i>(If yes, attach Form 1098-E)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N

ITEMIZED DEDUCTIONS

Note: The IRS allows taxpayers to reduce their income by taking the higher of the Standard Deduction or Itemized Deductions. For 2023, the standard deduction is \$13,850 for Single Filers, \$20,800 for HOH and \$27,700 for Married Filers.

• Did you make charitable contributions in 2023? <i>(If yes, attach receipts or acknowledgements from charity, cancelled check or other proof)</i>	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you use your vehicle to provide volunteer services to a charity?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• Did you pay state taxes on new vehicle purchased or monthly lease in 2023?	<input type="checkbox"/> Y	<input type="checkbox"/> N
• List your vehicle registration fees.	\$	
• Did you owe State or Local taxes when you filed your 2022 Income Tax Return? If yes, please list amount paid in 2023: \$ _____	<input type="checkbox"/> Y	<input type="checkbox"/> N

MISCELLANEOUS DEDUCTIONS

<ul style="list-style-type: none"> Did you purchase a new plug-in Electric Vehicle in 2023? If so, please list the make, model, vehicle's Vehicle Identification Number (VIN), purchase date and cost of vehicle on line below: 	\$
<ul style="list-style-type: none"> Michigan Residents Only: Did you make any contributions to a Michigan First-Time Home Buyers Saving Program in 2023? If yes, please list the bank name, account number and beginning & ending bank balance: 	\$
<ul style="list-style-type: none"> Did you work from home in 2023? If your employer is located in a city or state outside of your home location, you may qualify for a refund of city or state taxes paid. Please list dates you worked from home in "Other Information" section below. 	<input type="checkbox"/> Y <input type="checkbox"/> N

BUSINESS INFORMATION

Note: Complete this section if you received a 1099-NEC, 1099-MISC, 1099-K or own a small business

<ul style="list-style-type: none"> Date started your business: _____ / _____ / _____ 		
<ul style="list-style-type: none"> Did you materially participate in this business in 2023? 	<input type="checkbox"/> Y	<input type="checkbox"/> N
<ul style="list-style-type: none"> Did you pay estimated taxes in 2023? 	<input type="checkbox"/> Y	<input type="checkbox"/> N
<ul style="list-style-type: none"> Do you have records to support your business expenses? If yes, please attach receipts, 	<input type="checkbox"/> Y	<input type="checkbox"/> N
<ul style="list-style-type: none"> Did you use your vehicle for your business? 	<input type="checkbox"/> Y	<input type="checkbox"/> N
<ul style="list-style-type: none"> Do you have written evidence to support your vehicle expenses? Please list the following: 	<input type="checkbox"/> Y	<input type="checkbox"/> N
Business Miles Driven in 2023	Commuting Miles Driven in 2023	Other Miles Driven in 2023
_____	_____	_____

FILING QUESTIONS

<ul style="list-style-type: none"> Did you receive or request a six-digit Identity Protection PIN number from the IRS? 	<input type="checkbox"/> Y	<input type="checkbox"/> N
<ul style="list-style-type: none"> The IRS is able to deposit refunds directly into up to (3) taxpayer's accounts. If you receive a refund, would you like a direct deposit? 	<input type="checkbox"/> Y	<input type="checkbox"/> N
<ul style="list-style-type: none"> If yes, please provide the following information: 		
Name of Bank	Bank Routing Number	Bank Account Number
		<input type="checkbox"/> Checking <input type="checkbox"/> Savings
		<input type="checkbox"/> Checking <input type="checkbox"/> Savings
		<input type="checkbox"/> Checking <input type="checkbox"/> Savings
Select type of Tax Return Copy for your personal files:		<input type="checkbox"/> Electronic Copy <input type="checkbox"/> Paper Copy w/ Folder

How did you hear of Vision Tax Planning?	<input type="checkbox"/> Family/Friend (Last Name):	
<input type="checkbox"/> Google/Website Search	<input type="checkbox"/> Other (List Source):	

FILING QUESTIONS