

Miller & Company CPA's, PLLC

2023 INCOME TAX INFORMATION QUESTIONNAIRE

If any of the following items pertain to you or your spouse for 2023, please check the appropriate box and provide any necessary information. (Please complete and bring to your appointment)

YES NO

- [] [] Are any of your unmarried children who might be claimed as dependents 19 years of age or older?
- [] [] Were there any marriages, divorces, births, adoptions, or deaths in your immediate family during 2023?
- [] [] **Do you and your dependents have healthcare coverage for the full year? If you received Form 1095-A (Health insurance marketplace statement), 1095-B (Health Coverage), or Form 1095-C (Employer Provided), please provide the applicable 1095 form.**
- [] [] Did you have any children under age 19 or full time students under age 24 at the end of 2023, with interest and dividend income in excess of \$1,250, or total investment income in excess of \$2,500? (Enclose 1099 interest or 1099 dividend form)
- [] [] Did you have child care expenses in 2023? (Please enclose provider's name, Social Security number, and amount paid per child)
- [] [] Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a Partnership, S Corporation, Trust, or REMIC?
- [] [] Did you purchase any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any personal assets to business use in 2023? If yes, list the description, related business or activity, date placed in service, and cost or basis on an attached schedule and bring in. In addition, please bring papers for purchases with you to your appointment.
- [] [] Did you dispose of any business assets (including real estate) in 2023? If yes, list the date sold, sales price, description, and expenses of sale on an attached schedule and bring in. In addition, please bring closing papers, cost information (including any improvements made), and information on exchange of real estate with you to your appointment.
- [] [] Did you buy or sell any stocks, bonds or other investment property in 2023? If yes, please list the description, date acquired, date sold, sales price, cost or basis, and expense of sale on an attached schedule and bring in.
- [] [] Did you purchase, sell or refinance your principal home or second home or did you take a home equity loan? If yes, please bring in cost information (including improvements made) and closing papers.
- [] [] Did you have any debts cancelled or forgiven in 2023?
- [] [] Does anyone owe you money which has become uncollectible in 2023?
- [] [] Did you make any residential energy-efficient improvements or purchases involving solar, wind, Geothermal or fuel cell energy sources?
- [] [] Did you and/or your spouse receive a distribution from or make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? If so, please indicate the amount of funds: \$ _____ Date: _____ {Enclose 1099 R(s)}
- [] [] Did you and/or your spouse "roll over" a retirement or profit-sharing plan distribution into another plan? If yes, bring in Form 1099 R(s).
- [] [] Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?
- [] [] Did you, your spouse or a dependent incur any tuition expenses that are **required** to attend a college, university or vocational school?
- [] [] Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?
- [] [] Did you purchase an electric vehicle in 2023?