

2022 QUESTIONNAIRE

While you are getting your paperwork together, please take to moment to answer the following:

Any changes in your marital status, dependents, or address?
Any crypto/virtual currency activity in 2022?
Any foreign accounts in 2022?

In addition, do you have:

Health insurance through healthcare.gov?
Unemployment compensation?
IRA or 401K coronavirus-related repayments?
Charitable contributions?
Cryptocurrency?
Foreign accounts?
Did you buy, sell, or refinance your home?

**Any other income besides what you have received on tax forms?
Please bring in all your tax forms and any other tax paperwork.**

The following deductions can be used on the Arizona return in addition to the standard deduction:

Charitable contributions → List each charity, amount and attach receipt or letter from charity.

Long term care insurance premiums → List each payment and attach receipts.

529 (education savings account) plan contributions → List each beneficiary and amount contributed in 2022.

Please provide your (and your spouse's) driver's license information - license number, state of issue, issue date, and expiration date.

If your direct deposit information has changed, please provide a voided check.